## DOCUMENT RESUME

ED 171 260 IR 007 266

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| TITLE | Educational Dissemination and Linking Agent Sourcebook: A Collection of Product Resources. |
| INSTITUTION | Far West Lab. for Educational Research and Development, San Francisco, Calif. |
| SPONS AGENCY | National Inst. of Education (DHEW), Washington, D.C. |
| PUB DATE | May 76 |
| NOTE | 122p.; First draft |
| AVAILABLE FROM | Far West Laboratory for Educational Research and Development, Order Department, 1855 Folsom Street, San Francisco, California 94103 ($9.50; $7.00 without notebook binder) |
| EDRS PRICE | MF01 Plus Postage. PC Not Available from EDRS. |
| DESCRIPTORS | Adoption (Ideas); Change Agents; Curriculum Planning; Educational Assessment; *Educational Planning; Educational Strategies; Elementary Secondary Education; Evaluation; *Instructional Design; *Instructional Innovation; *Management Systems; *Program Development; Resources; Training |

ABSTRACT

This sourcebook lists over 50 items produced to aid in the design, development, implementation, and evaluation of educational innovation and change at the K-12 level. A group of cooperating Educational Laboratories and research and development centers have agreed to work together and with NIE, its R&D Utilization Contractors, and other clients, to provide for more effective awareness and use of products produced in recent years to improve educational practices of American schools. The products listed focus on providing training, procedural guidelines, or other aids that will foster more systematic, rational, and participative planning and decision-making about curriculum and instruction, including the modification of personal, social, and organizational activities that relate to the quality of educational programs and the climate of classroom and school environments. To facilitate selection of a particular product, three indexes are provided: (1) content--states of program change, focus of change, clusters of administrative functions, management and organizational skills, and linker/facilitator skills; (2) intended user groups; and (3) presentation formats. (RAO)

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ED171260

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# EDUCATIONAL DISSEMINATION AND LINKING AGENT SOURCEBOOK

## A COLLECTION OF PRODUCT RESOURCES

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and Development
TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC) AND USERS OF THE ERIC SYSTEM."

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**DEVELOPED BY**

**EDUCATIONAL LABORATORIES AND R & D CENTERS**

IR007266

**First Draft, May 1976**

This Sourcebook is the joint product of the following Educational Laboratories and R&D Centers:

Center for Educational Policy and Management,
Eugene, Oregon

Center for the Study of Evaluation,
Los Angeles, California

Far West Laboratory for Educational Research
and Development, San Francisco, California

Northwest Regional Educational Laboratory,
Portland, Oregon

Research and Development Center for Teacher
Education, Austin, Texas

Research for Better Schools, Inc.,
Philadelphia, Pennsylvania

Stanford Center for Research and Development
in Teaching, Stanford, California

SWRL Educational Research and Development,
Los Alamitos, California

The Wisconsin Research and Development Center
for Cognitive Learning, Madison, Wisconsin

It was produced to support the R&D Utilization Program of the School Practice and Service Division, the National Institute of Education Dissemination and Resource Group, the National Institute of Education.

Sourcebook copies may be purchased for $9.50 ($7.00 without notebook binder), prepaid, from Far West Laboratory for Educational Research and Development, Order Department, 1855 Folsom Street, San Francisco CA 94103.

The compilation of this Sourcebook was made possible by a grant from the National Institute of Education, U.S. Department of Health, Education, and Welfare. However, the opinions expressed to not necessarily reflect NIE position or policy, and no official endorsement by the National Institute of Education or the U.S. Department of Health, Education, and Welfare should be inferred.

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## INTRODUCTION

The School Practice and Service Division of the National Institute of Education is committed to building knowledge of the processes and organizational structures involved in improving educational practice. In line with these objectives, the Consumer Information Branch is directed toward solving major educational problems by increasing the use of R&D outcomes. The major strategies to be used are the dissemination of information to school users and a "feed-forward" of consumer information to R&D producers to make them more sensitive to operational school problems as they design new R&D efforts. A group of cooperating Educational Laboratories and R&D Centers has agreed to work together and, with NIE, its R&D Utilization Contractors, and other clients, to provide for more effective awareness and use of products produced in recent years to improve educational practices of American schools. Although many of these products have focused directly on curriculum and instruction, others have dealt with the need to provide assistance to educators who were concerned with providing change support to the staffs of schools and school districts.

Although identified under various rubrics, e.g., comprehensive planning, organizational development, educational planning and management, program evaluation, linking agent training.....these products have the general common objective of providing linking agents and change agents with training resources or job aids.

The products represent a broad range of content, format, and methodology. Moreover, they approach the process of change from a variety of perspectives, employ different techniques, and assume various conditions for effective use:

- Some of these products represent mutually supportive resources; others represent competitive or alternative resources.
- During their developmental process, all these products have benefited by participation of central office administrators, principals, and teachers--and sometimes state educational agency, intermediate educational service agency, and university personnel.
- All have been developed in recognition of needs of school district personnel to bring improvement to their schools.

The products are primarily focused on providing training, procedural guides, or other aids that will foster more systematic, rational, and participative planning and decision-making about curriculum and instruction, including the modification of personal, social, and organizational activities that relate to the quality of educational programs and the climate of classroom and school environments. Because over 50 major items are listed in this edition (not counting smaller elements within these items), the educational "linking" or change agent is confronted with a rich array of resources that can be used singly or in various combinations.

### Multi-Level Information System

This Sourcebook is just one part of an information system which is designed to assist educational linking and change agents. The specific components are indicated below with an explanation of what the user can secure.

| | |
|---|---|
| ● THIS SOURCEBOOK | Tables of Contents...quick guidance toward further review of products providing linking agents and change agents with training resources or job aids.<br>Product Descriptions...brief parallel narratives for study by potential users. |

| | |
|---|---|
| • NIE CATALOG | Information concerning description and documentation of the research, development, and evaluation of the product including information regarding the developer's claims and assurances for the product.* |
| • PRODUCT SELECTION SPECIALISTS | Persons familiar with a particular group of products developed by several Laboratories and Centers. Their role is to help potential users in selecting a particular product or combination of products that may best fit the users' needs. They may also be able to advise you regarding the order in which products should be used, how to adapt sets of products for particular needs, etc. In general, their aim is to help you make wise choices among products and to develop realistic and effective plans for use of the products you select. Names, addresses, and telephone numbers of these specialists are listed in the reference section (blue paper). |
| • PRODUCTS/SERVICES | Available from publishers, Laboratories, and Centers as noted in this catalog's product descriptions. |
| • PRODUCT UTILIZATION SPECIALISTS | Persons usually associated with the Educational Laboratory or R&D Center which developed the product. Their role is to provide you with detailed information concerning the development, evaluation, or utilization of the products. In some cases they may be able to offer technical assistance or to recommend where technical assistance can be obtained (e.g., consulting, training, support services), if this is needed for the effective implementation of the product. Names, addresses, and telephone numbers of these specialists are listed in the reference section (blue paper). |
| • PRODUCT DEVELOPMENT AND EVALUATION REPORTS | Numerous reports documenting the development and evaluation of these products are available either directly from the developer Laboratory or Center or through ERIC. |

## Using This Sourcebook

First, you should examine the several "Tables of Contents." They have been designed to help potential users with different needs and perspectives to gain a quick overview of the products in terms of several organizing frameworks. Each "Table of Contents" contains a brief introduction and, where needed, some suggestions on how to use the table.

Next identify a few products that interest you and turn to these descriptions. Note, products have been coded by a Laboratory/Center identification followed by a product number within each Laboratory/Center series. There are no page numbers. Product descriptions have been collated alphabetically by Laboratory/Center abbreviation and then numerically by product number.**

Each product description follows an identical format in terms of the order of major headings and subheadings. (If a heading does not appear, there was no entry for that item.) The major headings are:

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* In a few instances, the products are so recent that they are not found in the NIE catalog. A supplementary document will be developed to provide updated references for all the products listed in this Sourcebook.

**This system allows anyone to add products or R&D agency product series without the need for repagination. Moreover, the product descriptions may be removed and reorganized to create subsets (e.g., comparable products from different agencies; all the products which have similar intended audiences).

| | |
|---|---|
| ● TITLE OF PRODUCT | |
| ● INTENDED USERS | |
| ● MAIN EMPHASES | contains brief prose descriptions drawing on descriptor terms to indicate the general character and content of the product (e.g., skills, training, attitude change, procedural guide, needs assessment).* |
| ● INTENTS/CONTENTS | identifies the main goals or outcome expectations of the product, main substantive content, (e.g., instructional program, organizational development) and the main procedural content (e.g., needs assessment, evaluation, information retrieval). |
| ● MAIN ACTIVITIES | describes activities users engage in (e.g., reading, taking part in simulations or games, collecting data). |
| ● PROVISIONS FOR USE | contains subsections identifying:<br>A. Format<br>B. Personnel<br>C. Product components<br>D. Other required or recommended resources--materials, facilities...<br>E. Related products for the same or other Laboratories or Centers<br>F. Time span. |
| ● CONDITIONS OF USE | provides specific information regarding constraints on use, prerequisites, types of administrative/organizational settings required, etc., which the developer believes should be considered by potential users. |
| ● ADAPTABILITY | contains comments indicating how the product may be adapted to other formats, uses, content areas. (This section does not appear for many products.) |
| ● COST RANGE | provides information on cost of project components per participant, and, where not obvious, estimates of other costs. In some cases maximum/minimum price tag estimates are provided for different levels of use. In most cases, instructor, release time, and other costs are not included. |
| | may contain address where materials may be ordered. If no address is provided contact the Product Utilization Specialist for the Laboratory or R&D Center listed in the reference section (blue paper).** |
| ● REFERENCES | contains volume and page numbers of the complete product if an entry appears in the NIE catalogue. |

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* This section is the prose equivalent of the string of ERIC descriptors and identifiers which appear in Research in Education. It serves a similar function of identifying "index" terms. Eventually we hope to bring the key terms in this section into closer compatibility with the Thesaurus of ERIC Descriptors.

** Because the organizations, persons, and conditions of access will change over time and with the type of user, coded references to separate listings permit easy update or modification of these references without the need to change entries in the descriptions themselves.

## CRITERIA

The resources described in this Sourcebook were carefully selected to insure that they are relevant and useful for persons concerned with providing change support to school systems and school personnel.

Each product included in this edition of the Sourcebook meets the following criteria:

1. The intent of the product must be to provide educational change support. We acknowledge that our definition of this concept is fuzzy and will probably change in time. By consensus we identified "exemplars" for inclusion in this catalog.

2. The product must be designed for use by "linking agents" whose clients are school personnel at preschool, elementary, and/or secondary levels and whose primary functions may be (a) teaching, (b) school administration, (c) pupil personnel services, (d) curriculum development, or (e) district administration. (This criterion does not exclude involvement of parents, students, community members, or other groups, but serves to emphasize the primary character of the intended users.)

3. The intent of the product must be to provide or support training, or to provide procedural guides or other work aids that can be used by "linking" or "change" agents either (a) to acquire skills, knowledge, or sensitivities they need themselves, or (b) to facilitate their work with clients, or (c) to train, guide, or assist clients in developing their own capabilities to accomplish change activities (e.g., needs assessment, analysis and selection of R&D outcomes, planning for implementation, evaluation of implemented programs, organizational development).

4. The product must be available for distribution on a national scale or replicable through use of guide lines, consultants, site visitations, or other comparable means. (This criterion does not imply that the product must be openly accessible to anyone, but it does imply that it must be accessible to qualified users.)*

5. The product must have been developed under NIE sponsorship by an Educational Laboratory or R&D Center willing to participate in the Cooperative Dissemination and Linking Agent Training Project. We acknowledge that this is a highly arbitrary criterion that has been established as much for expediency as for any other reason. We know that there are other competitive products that are available that may be of comparable quality; indeed, some may have greater potential utility for particular users.

   Eventually we hope that this Sourcebook can be enlarged to include a broader range of products than those produced by Laboratories and Centers.**

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* Some products are still in late stage of development and are accessible only through negotiation with the developer. Such products have been included if the developers' restrictions seemed reasonable.

** The reasons for the current restriction are as follows: (1) All of the products are themselves the outcomes of research and development cycles. Each has been developed, tested, and proven useful. The developers' claims have been documented and verified. (2) The staffs of the Laboratories and R&D Centers who produced these products have worked in informal association for several years, and, under the guidance of NIE, have attempted to articulate their separate product lines so that a reasonably comprehensive and flexible array of products would be available to users. (3) The cooperating Laboratories and Centers have agreed to work together and with NIE and its R&D Utilization Contractors and other clients to provide for more effective awareness and use of these products. This entails a requirement for providing information, making presentations, providing continuing technical assistance that supports not only each Laboratory's or Center's products, but also supports selection and utilization of all other products. Coping with the effective presentation, implementation, and utilization of even the present set of products is a major undertaking. Once we see that it can be done effectively, consideration will be given to relaxing the restrictions of this criterion.

MAILBACK FORM

WOULD YOU LIKE TO KEEP THIS SOURCEBOOK UPDATED ?

This Sourcebook has been deliberately designed to make it easy to update entries. We intend to add product descriptions, make corrections, update the list of persons, addresses, and telephone numbers given in the reference section (blue paper), add an index, etc.

If you would like to keep your Sourcebook updated, please complete and return the form below.

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EDUCATIONAL DISSEMINATION AND LINKING AGENT SOURCEBOOK

Mailing List Information

MAIL TO:
Far West Laboratory for Educational Research and Development
Attention: Paul Hood
1855 Folsom Street
San Francisco CA 94103

NAME: ______________________________

ADDRESS: ______________________________

______________________________

STATE: ____________________ ZIP CODE: __________

TELEPHONE NUMBER: ( ) ______________

FOR OUR INFORMATION:

1. WHAT IS THE TITLE OF YOUR POSITION?

______________________________

2. HOW DO YOU EXPECT TO USE THE SOURCEBOOK IN YOUR WORK?

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3. DO YOU HAVE ANY SUGGESTIONS FOR IMPROVING THE SOURCEBOOK (e.g., content, information about products, format)?

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## PRODUCT SELECTION SPECIALISTS

These persons are familiar with groups of products developed by several Laboratories and R&D Centers. Their role is to help potential users in selecting a particular product or combination of products that may best fit the users' needs. They may also be able to advise you regarding the order in which products should be used, how to adapt sets of products for particular needs, etc. In general, their aim is to help you make wise choices among products and to develop realistic and effective plans for the products you select.

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For assistance particularly regarding products from CSE, CEPM (SPECS only), FWL, or RBS, contact any of the following persons:

Dr. Stan Temkin
(or Dr. Sharon Tumulty)
Research for Better Schools, Inc.
1700 Market Street, Suite 1700
(215) 561-4100 Philadelphia PA 19103

Dr. Adrianne Bank
Center for the Study of Evaluation
UCLA Graduate School of Education
405 Hilgard Avenue
145 Moore Hall
(213) 825-4711 Los Angeles CA 90024

Dr. Marie E. Shephardson
Center for Educational Policy
and Management
University of Oregon
1472 Kincaid Street
(503) 686-5087 Eugene OR 97401

For assistance particularly regarding products from CEPM, NWREL, TEXAS, STANFORD, or WISCONSIN, contact:

Dr. Bill Ward
Northwest Regional Educational Laboratory
Lindsay Building
701 S.W. Second Avenue
(503) 248-6868 Portland OR 97204

Dr. Walter Krupa
Wisconsin Research and Development
Center for Cognitive Learning
The University of Wisconsin
1025 West Johnson Street
(608) 263-4220 Madison WI 53705

Dr. Marie E. Shephardson
Center for Educational Policy
and Management
University of Oregon
1472 Kincaid Street
(503) 686-5087 Eugene OR 97401

## PRODUCT UTILIZATION SPECIALISTS

These persons are associated with the Educational Laboratory or R&D Center which developed the product. Their role is to provide you with detailed information concerning the development, evaluation, or utilization of the product. In some cases they may be able to recommend where technical assistance may be obtained (e.g., consulting, training, support services), if this is needed for effective implementation of the product.

| Laboratory/ Center Code | Address | Persons to Contact | Telephone Number |
|---|---|---|---|
| CEPM | Center for Educational Policy and Management<br>University of Oregon<br>1472 Kincaid Street<br>Eugene OR 97403 | CEPM 1-7: Dr. Lloyd DuVall<br>CEPM 8-11:<br>Dr. Richard Schmuck<br>Dr. Philip Runkel | (503) 686-5173<br>(503) 686-5067<br>(503) 686-5067 |
| CSE | Center for the Study of Evaluation<br>UCLA Graduate School of Education<br>405 Hilgard Avenue<br>145 Moore Hall<br>Los Angeles CA 90024 | Dr. Adrianne Bank | (213) 825-4711 |
| FWL | Far West Laboratory for Educational Research and Development<br>1855 Folsom Street<br>San Francisco CA 94103 | Dr. Paul D. Hood<br>Dr. C. Lynn Jenks | (415) 565-3187<br>(415) 565-3128 |
| NWREL | Northwest Regional Educational Laboratory<br>Lindsay Building<br>701 S.W. Second Avenue<br>Portland OR 97204 | Dr. Bill Ward<br>Ms. Marilyn Rieff | (503) 248-6868 |
| RBS | Research for Better Schools, Inc.<br>1700 Market Street, Suite 1700<br>Philadelphia PA 19103 | Dr. Stan Temkin<br>Dr. Sharon Tumulty | (215) 561-4100<br>(215) 561-4100 |
| STANFORD | Stanford Center for Research and Development in Teaching<br>School of Education<br>Stanford University<br>Stanford CA 94305 | Dr. Terrence E. Deal | (415) 497-4662 |
| SWRL | SWRL Educational Research and Development<br>4665 Lampson Avenue<br>Los Alamitos CA 90720 | Dr. Michael H. Moncrief<br>Dr. Roger Scott | (213) 598-7661, extension 129 |
| TEXAS | The Research and Development Center for Teacher Education<br>Education Annex 3.203<br>The University of Texas at Austin<br>Austin TX 78712 | Dr. Gene E. Hall | (512) 471-1343 |
| WISCONSIN | The Wisconsin Research and Development Center for Cognitive Learning<br>The University of Wisconsin<br>1025 West Johnson Street<br>Madison WI 53705 | Dr. Walter Krupa<br>Dr. Booker Gardner | (608) 263-4220 |

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# SELECTION SECTION

This section contains several Tables of Contents and Indexes that may help you to locate sources.

## INTRODUCTION TO TABLES OF CONTENTS

Five Tables of Contents are provided:

I Stages of Program Change
II Focus of Change
III Clusters of Administrative Functions
IV Management and Organizational Skills
V Linker/Facilitator Skills.

Each table is designed to provide a quick overview of those products which have been classified under the subheadings listed in each table. The row and column format of each table can be examined in two ways. First, by reading across the rows you can identify, by the presence of an asterisk, which products and how many products have been classified under each subheading. Second, you can read down a specific product column to gain some idea of the scope of the product (e.g., does it focus on just one area or does it cover several areas).

Table I: Stages of Program Change will help you to identify those products which have especially focused on one or more of the following four stages: planning, development, implementation, assessment.

Table II: Focus of Change identifies products in terms of their following change areas: curriculum/instructional, personnel, organizational, community.

Table III: Clusters of Administrative Functions identifies the products in terms of their relevance for a variety of administrative functions including: policy making, research/evaluation, supervision, training, technical assistance, resource management, leadership/group process, coordinating/linking, communicating, scheduling, resource review/selection, resource acquisition/allocation, data gathering, interpreting, and facility management.

Table IV: Management and Organizational Skills approaches the collection of sources from the perspective of the educational manager. It identifies products in terms of their focus on the following management skills areas: needs assessment, information identification/retrieval, goal setting, problem solving, decision making, dealing with conflict, budgeting, and accounting.

Table V: Linker/Facilitator Skills considers the sources in terms of the training or job needs of persons performing "linking agent" or "group process facilitator" roles. Included in this table are (a) two categories dealing with selection of personnel, linker selection criteria, and linker selection process, (b) the following set of linker training categories: consultation skills, organization development, theory and research on change, intervention/diagnosis, data gathering, design skills, interviewing skills, knowledge of R&D products, moral and ethical issues, communication skills, problem solving skills, entry issues, conflict utilization skills, termination issues, systems technology, confrontation skills, information retrieval, and group process skills; and (c) the following linker support system categories: location of the linker (internal or external to client system), organizational relation, job descriptions, job aids.

## INTRODUCTION TO INDEXES

There are three separate indexes in this first draft of the Sourcebook. The first indexes products by content. This index tends to cover the same general content areas which were displayed graphically in the several "Tables of Contents," but it was developed independently. It may be useful to consult both the "Tables of Contents" and the Content Index. If in doubt, the "Tables of Contents" are probably more definitive.*

Index II identifies products in terms of their intended user groups. This index will help you to locate products which you may want to consider if you are working with particular types of users. Many of the products were specifically designed for use by more than one type of user. Note that if a product is not listed under a specified user group, it does not necessarily imply that the product would not be appropriate, but only that the product developer did not identify that group as being an intended user.

Index III identifies the format or formats that the product fits. Many of the products are designed for individual or team training; others are primarily procedural guides or job aids. Those designed for training may be especially appropriate for particular training formats (e.g., workshops, formal courses of study, self-study). This index can be used to identify products to fit specific needs.

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* The "Tables of Contents" entries were checked by the Product Utilization Specialists of each Laboratory or R&D Center based on their specific knowledge of their product line. The index was prepared by analyzing only the content of the product descriptions contained in this Sourcebook.

## I. STAGES OF PROGRAM CHANGE

## II. FOCUS OF CHANGE

| | CEPM | | | | | | | | CSE | | | | | | | | | | FWL | | | | | | | NWREL | | | | | | | | | | RBS | | | | | | | | | | | ST | SWRL | | TX | | | WISC |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 1 | 2 | 4 | 6 | 8 | 9 | 10 | 11 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 1 | 1 | 2 | 1 | 2 | 3 | 1 |
| I. STAGES OF CHANGE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Planning | ★ | ★ | ★ | ★ | ★ | ★ | ★ | | ★ | | | | | | | | | | ★ | ★ | ★ | ★ | | | ★ | ★ | | | | | | | ★ | ★ | ★ | ★ | ★ | ★ | ★ | ★ | ★ | | | | | | ★ | ★ | | ★ | ★ | ★ | ★ |
| Development of Programs | ★ | ★ | ★ | | ★ | ★ | ★ | | ★ | | | | | ★ | | | | | ★ | ★ | ★ | ★ | ★ | | ★ | | | | | | | | | | ★ | | | | | ★ | ★ | | | | | | | | | ★ | | | ★ |
| Implementation | ★ | | ★ | | ★ | ★ | ★ | | ★ | | ★ | ★ | | ★ | | | | | | | | ★ | ★ | | ★ | ★ | | | | | | | | | ★ | | | | | | | | ★ | ★ | ★ | | | | ★ | ★ | ★ | | ★ |
| Assessment | ★ | | ★ | ★ | ★ | ★ | ★ | | ★ | ★ | ★ | ★ | ★ | ★ | ★ | ★ | ★ | ★ | | | | ★ | ★ | | ★ | ★ | ★ | ★ | ★ | ★ | ★ | ★ | ★ | ★ | ★ | | ★ | ★ | ★ | | | | | | | ★ | | | ★ | ★ | ★ | ★ | ★ |
| II. FOCUS OF CHANGE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Curriculum/ Instructional | ★ | | ★ | | ★ | ★ | | | ★ | ★ | ★ | ★ | ★ | ★ | ★ | ★ | ★ | ★ | ★ | ★ | ★ | ★ | ★ | | ★ | | | | | | | | | | ★ | ★ | ★ | | ★ | ★ | ★ | | | | | ★ | | ★ | ★ | ★ | ★ | | ★ |
| Personnel | | | | | ★ | ★ | | ★ | | | | | | | | | | | | | | | | ★ | ★ | | | ★ | ★ | ★ | ★ | ★ | ★ | ★ | ★ | | | | | | | | ★ | ★ | ★ | | | | | ★ | ★ | ★ | ★ |
| Organizational | ★ | | | | ★ | ★ | | ★ | | | | | | | | | | | | | | | | | | | | | | | | | ★ | ★ | ★ | ★ | | | | | | ★ | ★ | ★ | ★ | | ★ | | | ★ | ★ | ★ | ★ |
| Community | ★ | | ★ | | ★ | ★ | | | ★ | ★ | | | ★ | | | | | | | | | | | | | | | | | | | | ★ | ★ | ★ | | | ★ | | | | | | | | | | | | | | | ★ |

# III. CLUSTERS OF ADMINISTRATIVE FUNCTIONS

| | CEPM | | | | | | | | | | CSE | | | | | | | | | | FWL | | | | | | | NWREL | | | | | | | | | | RBS | | | | | | | | | ST | SWRL | | TX | | | WISC |
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| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 1 | 2 | 3 | 4 | 6 | 7 | 8 | 9 | 10 | 1 | 1 | 2 | 1 | 2 | 3 | 1 |
| III. CLUSTERS OF ADMINISTRATIVE FUNCTIONS | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Policy Making | * | | | | | * | | * | * | | | | | | | | | | | | * | * | * | * | | | | * | | | | | | | | | | | | | | | | | | | * | | * | * | * | * | |
| Research/ Evaluation | * | | | * | | | | | | | * | * | * | * | * | * | * | * | * | * | | | | | * | * | * | | | | * | * | * | * | | | | | * | * | * | | | | | | | | * | * | * | * | * |
| Supervision | | | | | | | | * | * | | | | | | | | | | | | | | | | | | | * | * | | * | * | * | * | | | | | | | | | | | | | | * | * | | | | |
| Training | | | | | | | * | * | * | * | | | | | | | | | | | * | * | * | * | * | * | * | * | * | * | * | * | * | * | * | * | | | | | | | | | * | * | | * | | | | * | * |
| Technical Assistance | * | * | | * | * | | | * | * | * | | | | | * | * | * | * | * | * | | | | | | * | | * | * | * | * | | * | * | * | * | | * | | | | | | | | | | * | * | * | * | * | |
| Resource Management | * | | * | | | * | | | | | * | | | | | | | | | | | | | | | | * | * | | * | | | | | | | | | | | | * | * | * | * | | | * | * | | | | |
| Leadership/ Group Process | | | | | | | * | * | * | * | | | | | * | | | | | | | | | | | | | * | * | * | * | * | * | * | * | * | | | | | | | | | | * | | | | | | | * |
| Communicating | * | | | * | | * | * | * | * | * | * | * | * | * | * | * | | | | | | | | | | * | * | * | * | | * | * | * | | | | | | | | | | | | | * | | | * | * | * | * | * |
| Scheduling | * | | | * | | | | | | | * | | * | * | | * | | | | | | | | | | | | | | | * | | | * | * | * | | | | | | | | | * | | | | | | | | * |
| Resource Review/ Selection | | | | | | | | | | | * | | | | | | * | * | * | * | | | | * | * | | * | | | | | | | | | | | | | | | * | * | * | * | | | * | | | | | |
| Resource Acquisition/ Allocation | * | | * | | | * | | | | | * | * | | | * | | | | | | | | | | | | | | | | | | | | | | | | | | | * | * | | * | | | * | * | | | * | |
| Data Gathering/ Interpreting | * | * | | * | | * | | * | * | * | * | * | * | * | * | * | * | * | * | * | * | | | | * | * | * | * | * | * | * | * | * | * | * | * | | | | | | | | | | | | | * | * | * | * | |
| Facilities Management | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | * |
| Coordinating/ Linking | | | | | | | | * | * | * | | | | | | | | | | | | | | | | * | * | * | * | * | * | * | * | * | * | * | | * | | | | | | | | | | | | * | * | * | * |

## IV. MANAGEMENT AND ORGANIZATIONAL SKILLS

| | CEPM | | | | | | | | CSE | | | | | | FWL | | | | | | | NWREL | | | | | | | | | | RBS | | | | | | | ST | SWRL | | TX | | | WISC |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 1 | 2 | 3 | 5 | 6 | 8 | 9 | 10 | 1 | 2 | 3 | 4 | 5 | 6 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 2 | 3 | 4 | 5 | 6 | 9 | 11 | 1 | 1 | 2 | 1 | 2 | 3 | 1 |
| IV. MANAGEMENT AND ORGANIZATIONAL SKILLS AND UNDERSTANDING | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Needs Assessment | * | | | * | * | * | * | * | * | * | | | * | | * | | | | | | * | * | * | * | * | * | * | * | * | * | * | * | * | * | | | | | | | | | | | * |
| Information Identification/ Retrieval | | | | | | | | | | | | | | | * | | | | | | * | * | | | | | | | | | * | | | | * | | | | | | * | | | | |
| Goal Setting | * | | | * | | * | * | * | * | * | | * | * | | | * | * | | * | | * | * | * | | * | | | * | * | * | * | * | | | | | | | | | | | | | * |
| Problem Solving | | | | | | * | * | * | | | | | | | * | | | * | | | * | * | * | * | * | | | * | * | * | * | | | | | | | | | | | | | | * |
| Decision Making | * | * | | | * | * | * | * | * | * | * | * | * | * | * | * | * | * | | | * | * | | | | | | * | | | * | | | | | * | | * | | | * | | | | * |
| Dealing with Conflict | | | | | | * | * | * | | | | | | | * | | | | | | | * | | * | | | | | | | * | | | | | | | | | | | | | | * |
| Budgeting | * | | * | | | | | | * | | | | | | | | | | | | | | | | | | | | | | * | | | | | | * | | | | | | | | * |
| Accounting | * | | * | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| | CEPM | | | | | CSE | | | | | | | | | | FWL | | | | | NWREL | | | | | | | | | RBS | | | | ST | SWRL | | TX | | | WISC |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 7 | 8 | 9 | 10 | 11 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 1 | 4 | 5 | 6 | 7 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 1 | 5 | 9 | 10 | 1 | 1 | 2 | 1 | 2 | 3 | 1 |
| V. LINKER/FACILITATOR | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| LINKER SELECTION | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Criteria | | * | * | | * | | | | | | | | | | | | | | | | * | | | | | | | * | * | | | | | | | | | | | * |
| Process | | * | * | | * | | | | | | | | | | | | | | * | | * | | | | | | | * | * | | | | | | | | | | | |
| LINKER TRAINING | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Consultation Skills | | * | * | | * | | | | | | | | | | | | | | * | | * | | | * | | | * | * | * | | | | | | | | | | | |
| Organization Development | | * | * | | * | | | | | | | | | | | | | | | | * | | | | | | | * | * | | | | | * | | | | | * | * |
| Theory & Research Change | | * | * | | * | | | | | | | | | | | | | | | * | * | | | | | | * | * | * | | | | | * | | | * | * | * | * |
| Intervention, Diagnosis | | * | * | | * | | | | | | | | | | | * | * | | * | | * | | | * | | | * | * | * | * | | | | | | * | * | * | * | |
| Data Gathering | | * | * | | * | * | * | * | * | * | * | | | | | * | | * | | * | * | * | * | * | * | * | | * | * | | | | | | | * | * | * | * | |
| Design Skills | | * | * | | * | * | | | | | * | | | | | | | | * | * | * | | | | | | * | * | * | | | | | | | | | | | |
| Interviewing Skills | | * | * | | * | * | | * | * | | * | | | | | | | | | * | | * | * | * | * | * | | * | * | | | | | | | | | | | |
| Knowledge--R&D Products | | * | * | | * | | | | | | | * | * | * | * | | | | | * | | | | | | | | * | * | | * | | | | * | | | | | |
| Moral and Ethical Issues | | * | | | * | | | | | | | | | | | | | | * | * | | | | | | | * | * | * | | | | | | * | | | | | |
| Communication Skills | * | * | * | | * | * | * | * | * | * | * | | | | | | | | | * | * | * | | * | * | * | * | | | | | | | | * | | | | | |
| Problem Solving Skills | | * | * | | * | | | | | | | | | | | | | | | * | * | | * | * | | | | * | * | | | | | * | * | | | | | |
| Entry Issues | * | * | * | | * | | | | | | | | | | | | | | | | * | | | | | | | * | * | * | | | | | * | | * | * | * | |
| Conflict Utilization Skills | | * | * | | * | | | | | | | | | | | | | | | | * | | | | | | * | | | | | | | | | | | | | |
| Termination Issues | * | * | * | * | * | | | | | | | | | | | | | | | | | | | | | | * | * | * | | | | | | * | | | | | |
| Systems Technology | | * | * | | * | | | | | | | | | | | | | | | * | | | | | | | | | | | | | * | * | | | | | | |
| Confrontation Skills | | * | * | | * | | | | | | | | | | | | | | | | | * | * | * | * | * | * | * | * | | | | | | | | | | | |
| Information Retrieval | | * | * | | * | | | | | | | | | | | * | | | * | * | | | | | | | | * | * | | * | | | | | | | | | |
| Group Process Skills | | * | * | | * | | | | | | | | | | | | | | | | * | | | * | * | * | * | | | | | | | | | | | | | |
| LINKER SUPPORT SYSTEM | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Location--Internal/ External | | * | * | | * | | | | | | | | | | | | | | * | * | * | | | | | | | | | | | | | | | | | | * | * |
| Organizational Relation | | * | * | | * | | | | | | | | | | | | | | | | | | | | | | | | | | | | | * | | | | | * | * |
| Job Descriptions | | * | * | | * | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | * |
| Job Aids | * | * | * | * | * | * | * | * | * | * | * | * | * | * | * | | | | * | * | | | | | | | | | | | | * | | | | | * | * | * | * |

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FWL 1, 3, 4
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Job or Role Definition

| | |
|---|---|
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Needs Assessment

| | |
|---|---|
| CEPM | 1, 6, 2 |
| CSE | 2, 5 |
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| NWREL | 9 |
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| | |
|---|---|
| CEPM | 8, 9, 10 |
| NWREL | 8, 9, 10, 11 |
| RBS | 10 |
| STANFORD | 1 |
| WISCONSON | 1 |

Organizational Development

| | |
|---|---|
| CEPM | 8, 9, 10 |
| NWREL | 3, 5, 7, 8, 9, 10, 11 |
| STANFORD | 1 |

Problem Solving

| | |
|---|---|
| FWL | 7 |
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Program Analysis

| | |
|---|---|
| CEPM | 2 |
| FWL | 2, 4 |
| NWREL | 9 |
| RBS | 1 |

Program Implementation Planning

| | |
|---|---|
| CSE | 3, 4 |
| FWL | 7 |
| RBS | 1 |
| SWRL | 1, 2 |

Program Planning

| | |
|---|---|
| CEPM | 1, 4 |
| FWL | 2, 4, 5 |
| NWREL | 9, 11 |
| RBS | 1, 2, 5, 6 |
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Program--Selection of Methods or Materials; Selection Criteria

| | |
|---|---|
| CEPM | 4 |
| FWL | 4 |
| NWREL | 9 |
| RBS | 5, 6 |
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Project Management

| | |
|---|---|
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| | |
|---|---|
| CEPM | 2 |
| FWL | 7 |

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| | |
|---|---|
| CEPM | 1 |
| FWL | 7 |
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| | |
|---|---|
| CSE | 5 |
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| | |
|---|---|
| CEPM | 4 |
| CSE | 5, 6, 7, 8, 9, 10 |
| FWL | 7 |
| RBS | 2 |
| SWRL | 2 |

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| | |
|---|---|
| CEPM | 5 |
| FWL | 7 |
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| SWRL | 2 |

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| | |
|---|---|
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## INDEX II INTENDED USER GROUPS

Virtually any of the products listed in this Sourcebook might be of interest or value to any group of users. The following list identifies those products which would be of particular interest or relevance to various groups of users.

- School Level User Groups:

Students (K-12)

NWREL 4, 5, 6

Teachers

CSE 1, 2, 3, 4, 5, 6
FWL 1, 2, 3, 4, 5
NWREL 2, 3, 4, 5, 6, 7
RBS 1, 2, 3, 4, 5, 6, 10, 11
STANFORD 1
SWRL 1, 2
WISCONSIN 1

Department Chairmen

CSE 8
FWL 1, 2, 3, 4
RBS 1, 2, 3, 4, 5, 6, 10, 11
SWRL 1, 2
WISCONSIN 1

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FWL 1, 2, 3, 4, 5
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SWRL 1
WISCONSIN 1

Rural School Staff

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- District Level User Groups:

Administrators

CEPM 1, 2, 3, 4
CSE 1, 2, 3, 4
FWL 1, 2, 3
NWREL 2, 3, 4, 5, 6, 7
RBS 1, 2, 3, 4, 5, 6, 7, 8, 10, 11
STANFORD 1
SWRL 1, 2
TEXAS 1, 2, 3
WISCIONSIN 1

Business Officers

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Directors of Special Projects

CSE 6, 7, 8, 9, 10
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TEXAS 1, 2

District Level User Groups (continued)

Curriculum/Instruction Staff

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NWREL 2, 3, 4, 5, 6, 7
RBS 1, 2, 3, 4
SWRL 1
WISCONSIN 1

Change Specialists (internal)

CEPM 8, 9, 10, 11
FWL 6, 7
NWREL 9, 10, 11
RBS 8, 9
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TEXAS 1, 2, 3
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Evaluators

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Rural School Administrators

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School Board Members

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SWRL 1

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CEPM 5
CSE 5
NWREL 1, 3, 4
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Parents

CSE 5
NWREL 4, 5, 6
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- Other User Groups:

State or Intermediate Educational Agency Staff

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College Faculty

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NWREL 3

Other User Groups (continued)

### College Students

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CSE 7, 8, 9
FWL 1, 2, 3, 4, 5
NWREL 2, 4, 5, 6, 7
RBS 10
SWRL 1

### Educational Consultants

CEPM 8, 9, 10

### Organization Change Specialists (external)

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NWREL 9, 10, 11
RBS 8, 9
STANFORD 1
TEXAS 1, 2, 3

### Researchers

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FWL 6, 7
STANFORD 1
TEXAS 1, 2, 3

### Curriculum Developers

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FWL 6, 7
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TEXAS 1, 2, 3

### Test Publishers

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FWL 6

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## • INDIVIDUAL TRAINING

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| | |
|---|---|
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| CSE | 1, 2, 3, 4, 6 |
| FWL | 1, 2, 3, 4, 5, 6 |
| NWREL | 2, 3, 4, 5, 6, 7, 8, 9, 10, 11 |
| RBS | 1, 7, 8, 9 |
| STANFORD | 1 |
| SWRL | 1 |

### Course

| | |
|---|---|
| CEPM | 1, 4, 9 |
| FWL | 1, 2, 3, 4, 5, 6, 7 |
| NWREL | 2 |
| SWRL | 1 |
| STANFORD | 1 |

### On-the-Job (Self-study)

| | |
|---|---|
| CEPM | 2, 3, 4, 8, 9, 10 |
| CSE | 6 |
| FWL | 6, 7 |
| RBS | 7, 8, 9, 10 |
| SWRL | 1 |

## • TEAM TRAINING

### Team Building

| | |
|---|---|
| CEPM | 1, 2, 3, 4, 5, 6, 7 |
| FWL | 1, 2, 3, 4 |
| RBS | 1, 2, 3, 4, 5, 6, 11 |

### Organizational Development

| | |
|---|---|
| CEPM | 8, 9, 10, 11 |
| NWREL | 3, 4, 5, 6, 7, 8, 9, 10, 11 |

### Board Action

| | |
|---|---|
| CEPM | 6 |

### Community Development

| | |
|---|---|
| NWREL | 1 |

## • JOB AIDS/PROCEDURAL GUIDES

| | |
|---|---|
| CEPM | 5 |
| CSE | 5, 6, 7, 8, 9, 10 |
| RBS | 1, 3, 4, 5, 6, 7, 9 |
| SWRL | 2 |
| TEXAS | 1, 2, 3 |

## LIST OF PRODUCTS BY LABORATORIES AND CENTERS

CEPM
1 - School Planning, Evaluation, and Communication System (SPECS)
2 - A Systems Analysis of the School District (SPECS-1)
3 - Program Budgeting and Cost Accounting (SPECS-2)
4 - Program Planning, Evaluation and Communication (SPECS-3
5 - Community-Based Broad Goal Definition (SPECS-4)
6 - Assessing Achievement of the District's Broad Goals (SPECS-5)
7 - Ernstspiel Task Group Communications Kit
8 - Strategies of Organizational Change System (SOCS)
9 - Theory and Research on Organization Development and Change (SOCS-A)
10 - Technology for Organization Change Specialists (SOCS-B)
11 - Descriptions and Human Support for Organization Change Specialists (SOCS-C)

CSE
1 - CSE Evaluation Workshop I: An Orientation
2 - CSE Evaluation Workshop II: Needs Assessment
3 - CSE Evaluation Workshop IV: Implementation Evaluation
4 - CSE Evaluation Workshop V: Progress Evaluation
5 - CSE Elementary School Evaluation Kit: Needs Assessment
6 - CSE Summative Evaluation Kit
7 - CSE Elementary School Test Evaluations
8 - CSE Secondary School Test Evaluations
9 - CSE-ECRC Preschool/Kindergarten Test Evaluations
10 - CSE-RBS Test Evaluations: Tests of Higher-Order Cognitive, Affective, and Interpersonal Skills

FWL
1 - Determining Instructional Purposes: Unit 1 - Setting Goals
2 - Determining Instructional Purposes: Unit 2 - Analyzing Problems
3 - Determining Instructional Purposes: Unit 3 - Deriving Objectives
4 - Designing Instructional Programs
5 - Evaluation for Program Improvement
6 - Educational Information Consultant Instructional System
7 - Educational Development, Dissemination, and Evaluation (DD&E) Training Resources

NWREL
1 - Rural Futures Development (RFD) Strategy
2 - Systematic and Objective Analysis of Instruction (SOAI)
3 - Social Conflict and Negotiative Problem Solving
4 - Research Utilizing Problem Solving
5 - Interpersonal Communications (IPC)
6 - Interpersonal Influence (INF)
7 - Group Process Skills (GPS) -- A Skills Training Workshop
8 - Preparing Educational Training Consultants (PETC)
9 - Preparing Educational Training Consultants: Skills Training (PETC-I)
10 - Preparing Educational Training Consultants: Consulting (PETC-II)
11 - Preparing Educational Training Consultants: Organizational Development (PETC-III)

RBS
1 - Inventory for Curriculum and Instructional Improvement
2 - Handbook of Comprehensive Planning in Schools
3 - Surveying Your Community: An Approach to Community Involvement in Schools
4 - Pupil-Perceived Needs Assessment Package
5 - Curriculum and Instruction: Planning Improvement
6 - Selecting a Curriculum Program: Balancing Requirements and Costs
7 - Proposal Development
8 - Project Management: Executive Orientation
9 - Project Management: Basic Principles
10 - Human Dimensions of School Improvement
11 - Evaluating a Curriculum Program: An Educator's Handbook

STANFORD 1 - An Organizational Perspective on Planning and Problem Solving In Schools

SWRL 1 - Instructional Product Selection Kit (IPSK)
2 - SWRL Proficiency Verification Systems (PVS)

TEXAS 1 - Stages of Concern About the Innovation
2 - Levels of Use of the Innovation
3 - "Trouble Shooting" Checklists (TSC)

WISCONSIN 1 - "Individually Guided Education" (IGE)

# DESCRIPTIONS

## SCHOOL PLANNING, EVALUATION, AND COMMUNICATION SYSTEM (SPECS)

### • INTENDED USERS

A. Primary: School district's professional staff, the community, the board of education.

### • MAIN EMPHASES:

1. Providing information, budgeting and cost accounting, defining goals, procedural guides/work aids.
2. Needs assessment, goal setting, decision making, resource allocation, monitoring and evaluation.

### • INTENTS/CONTENTS

1. Main goals: Enable school personnel and community representatives to plan, implement, evaluate, and replan programs using actual program performance data.
2. Main content areas:
   Substantive: Instructional programs, finance, organization structure, support systems.
   Procedural: Needs assessment, goal setting, decision making, resource allocation, monitoring and evaluation.

### • MAIN ACTIVITIES

1. Identifying interrelationships of district's programs.
2. Developing a program budgeting and cost accounting system.
3. Developing an instructional program planning and evaluation system.
4. Identifying community defined educational goals.
5. Identifying consonance gaps between district outputs and community goals.

### • PROVISIONS FOR USE

A. Format: Workshops, courses, consultation sessions.

B. Personnel:
Recommended: School district administrative staff member required to coordinate all SPECS activities.
Outside consultant help of 10 to 15 days the first year of implementation.
Involvement of all professional staff.

C. Product Components: A Systems Analysis of the School District. Program Budgeting and Cost Accounting. Program Planning, Evaluation and Communication. Community-Based Broad Goal Definition. Assessing Achievement of the District's Broad Goals.

D. Other Resources: Materials to help school personnel implement the system, consultant's manual, overview booklet.

E. Related Products:
.CSE Evaluation Workshops.
.CSE Elementary School Evaluation Kit Series.
.FWL Evaluation for Program Improvement.
.RBS Administering for Change Program.

F. Time Span: Three to five years required to implement all five components of SPECS.

### • CONDITIONS OF USE

A. High level of commitment necessary from administrative staff and teachers.

B. Implementation requires several steps:
.District-wide planning committee determines specific implementation strategy.
.Implementation plan identifies time lines, needed resources, program areas for initial attention, monitoring process.
.Initial implementation efforts (i.e., in-service sessions, information sharing efforts).
.Initial activities identified in plan made operational.

C. Phased-in strategy appears most successful.

### • ADAPTABILITY

1. SPECS can be used by entire school district, single building or single programs within an organization.
2. Five components of activities may be used individually or as a package in any sequence.
3. SPECS materials may be used outside of SPECS format.
4. Although developed specifically for school districts, SPECS can be used in any educational organization, i.e., community college.

- COST RANGE

  One year pilot implementation in one or two schools in district for approximately $3,000 for Components 1, 2, 3 and 4, plus computer costs needed to implement Component 2.
  Overview Booklet: SPECS: What It Is and What It Does. Price $3.00.

- REFERENCES: NIE Catalogue, page number 1006.

## A SYSTEMS ANALYSIS OF THE SCHOOL DISTRICT (A component of SPECS)

### • INTENDED USERS

School district's professional staff.

### • MAIN EMPHASES

1. Providing information on current status.
2. Identifying hierarchical relationships among current programs and activities.

### • INTENTS/CONTENTS

1. Main goals:
   .Production of written description and visual display of current program structure.
   .Specify areas for data collection in Components Two and Three.
2. Main content areas:
   Substantive: Program structure and systems.
   Procedural: Decision making.

### • MAIN ACTIVITIES

Collecting and displaying data about the district's current array of instructional and noninstructional functions, activities or programs.

### • PROVISIONS FOR USE

A. Format: Working in on-the-job situations, 1:1, consultative assistance.
B. Personnel: Central office staff, program manager.
C. Product Components:
   .Questionnaire to identify, describe and interrelate current array of programs, functions and activities.
   .Development of visual display of structure.
   .Designation of specific level of operational programs or what data will be collected in Components Two and Three.
   .Development of procedures for review and update structure and designated programs.
   .Component One implementation booklet.
D. Other Resources: Remaining components of SPECS.
E. Related Products: None
F. Time Span: One-two months.

### • CONDITIONS OF USE

Identification of person responsible.

### • COST RANGE

Three-person months of time.

### • REFERENCES: NIE Catalogue, page number 1006.

## PROGRAM BUDGETING AND COST ACCOUNTING (A component of SPECS)

- INTENDED USERS

District staff, primarily in the central office -- business office staff.

- MAIN EMPHASES

1. Providing information.
2. Budgeting and cost accounting.

- INTENTS/CONTENTS

1. Main goals: To produce an annual program budget and periodic program accounting reports.
2. Main content areas:
   Substantive: Finance/budgeting.
   Procedural: Data collection and analysis.

- MAIN ACTIVITIES

Developing forms and procedures for collecting and displaying data; translating district's current operating budget from line item format to program format; developing computerized data-processing system to handle expected flow of budgetary and expenditure data relevant to each program.

- PROVISIONS FOR USE

A. Format: Working in on-the-job situations, workshop, 1:1, consultative sessions.
B. Personnel: Business manager.
C. Product Components:
   .Chart of accounts of current programs and related object--cost categories.
   .Annual program budget of each program represented in 1.
   .Periodic cost accounting reports.
   .Component Two implementation booklet.
D. Other Resources: Remaining components of SPECS.
E. Related Products: None
F. Time Span: One-three years.

- CONDITIONS OF USE

Time of personnel, commitment by Board of Education and central administration, training for district personnel.

- ADAPTABILITY

See SPECS product description.

- COST RANGE

Cost of personnel time, consultations, computer time.

- REFERENCES: NIE Catalogue, page number 1006.

## PROGRAM PLANNING, EVALUATION AND COMMUNICATION (A component of SPECS)

- INTENDED USERS

District program staff.

- MAIN EMPHASES

1. Procedural guides/work aids.
2. Goal setting, selecting processes, evaluating, communicating.

- INTENTS/CONTENTS

1. Main goals: Production of program planning and evaluation documents.
2. Main content areas:
   Substantive: Instructional programs (desired and actual outcomes).
   Procedural: Goal setting, selecting processes to achieve goals, evaluating actual outcomes compared to desired outcomes, making recommendations to improve instructional program, disseminate information about effective methods and materials.

- MAIN ACTIVITIES

Writing instructional goals and objectives, selecting program methods and materials for implementing these, collecting and interpreting data about actual student performance.

- PROVISIONS FOR USE

A. Format: Working in on-the-job situations, workshops, inservice, courses, consultative sessions.
B. Personnel: Program staff in areas identified by Component One.
C. Product Components:
   .Instructional Program Summary Plan. Price 40 cents.
   .Booklet One: Record of Instructional Program Objectives. Price $1.15 each.
   .Booklet Two: Weekly Lesson Plans (two forms: 40 weeks of plans for one program. Price $1.00 each. 40 weeks of plans for up to three programs. Price $1.15 each.)
   .Booklet Three: Record of Student Performance. Price $2.50 each.
   .Instructional Program Summary Report. Price 40 cents.
   .Component Three implementation booklet.
D. Other Resources: Remaining components of SPECS.
E. Related Products: RBS Handbook of Comprehensive Planning in Schools; RBS Evaluating a Curriculum Improvement; CSE Evaluation Workshop III; Program Planning and IV, V, VI: Evaluation; CSE Evaluation Kits on Formative and Outcome Evaluation.
F. Time Span: One-three years, depending on scope of activity undertaken.

- CONDITIONS OF USE

Level of commitment needed from board, administration and professional staff, less time required if professional staff is acquainted with program planning and evaluation.

- ADAPTABILITY

See SPECS product description.

- COST RANGE

Dependent upon need for consultative services, amount of materials required, inservice needs.

- REFERENCES: NIE Catalogue, page number 1006.

## COMMUNITY-BASED BROAD GOAL DEFINITION (A component of SPECS)

- INTENDED USERS

Citizens of a school district.

- MAIN EMPHASES

Broadly defining the community's goals and expectations.

- INTENTS/CONTENTS

1. Main goals: Provide means for citizen participation in setting broad educational goals.
2. Main content areas:
   Substantive: Instructional programs.
   Procedural: Needs assessment, goal setting.

- MAIN ACTIVITIES

Involving representative sample of citizens in generating and reviewing a set or structure of broad educational goals.

- PROVISIONS FOR USE

A. Format: Interviews, citizen meetings, surveys.
B. Personnel: Professional staff to work with the community in developing the broad goals.
C. Product Components:
   ."Procedural guide" for developing community-based broad goal definition.
   .Detailed description of one possible strategy.
D. Other Resources: Remaining components of SPECS.
E. Related Products: RBS Surveying Your Community; CSE Elementary School Evaluation Kit: Needs Assessment; CSE Evaluation Workshop II: Needs Assessment.
F. Time Span: Four-twelve months: Updated periodically.

- CONDITIONS OF USE

Commitment to citizen input on part of Board and professional staff.

- ADAPTABILITY

See SPECS product description.

- COST RANGE

Staff time.

- REFERENCES: NIE Catalogue, page number 1006.

CEPM 6

## ASSESSING ACHIEVEMENT OF THE DISTRICT'S BROAD GOALS (A component of SPECS)

- INTENDED USERS

School District's Board of Education.

- MAIN EMPHASES

1. Providing information on consonance between district's output and community goals.
2. Needs assessment, evaluation.

- INTENTS/CONTENTS

1. Main goal: Production of periodic report identifying specific district needs and setting priorities for dealing with these needs.
2. Main content areas:
   Procedural: Needs assessment, evaluation, establishing policy for setting priorities and choosing alternatives.
   Substantive: None

- MAIN ACTIVITIES

1. Receiving summarized program education data.
2. Familiarization of community's broad goals.
3. Determining lack of consonance between program evaluation data and community goals.
4. Developing recommendations to meet needs presented by gaps between the program evaluation data and the community goals.

- PROVISIONS FOR USE

A. Format: Committee discussion, Board action.
B. Personnel: Use of person responsible for SPECS implementation, task force or committee.
C. Product Components: The Component Five implementation booklet: Assessing Achievement of the District's Broad Goals.
D. Other Resources: Remaining components of SPECS.
E. Related Products: None
F. Time Span: Two months initially, review periodically.

- CONDITIONS OF USE

Must have completed other components of SPECS or similar systems.

- ADAPTABILITY

See SPECS product description.

- COST RANGE

Staff time.

- REFERENCES: NIE Catalogue, page number 1006.

# ERNSTSPIEL TASK GROUP COMMUNICATIONS KIT

- INTENDED USERS

Any group entering/anticipating entering, cooperative task-oriented arrangements, any groups wishing to improve skills, and have neither the funds, time nor inclination to use an outside consultant.

- MAIN EMPHASES

A. Build understanding and skills/competency training in communications.
B. Communicating.

- INTENTS/CONTENTS

1. Main goals: Provide self-instructional materials to help groups become aware of intricate problems of interpersonal communication.
2. Main content areas:
   Substantive: Series of eight games providing group members a common experience to analyze and discuss.
   Procedural: one-way and two-way communication, tacit communication, non-verbal, by-pass, overload, written, group norms, and individual vs. group.

- MAIN ACTIVITIES

1. Take part in series of games providing common experience in several aspects of communication.
2. Analyze and discuss communication experiences.

- PROVISIONS FOR USE

A. Format: Series of workshops.
B. Personnel: Discussion leader.
C. Product Components: Kit provides materials necessary for games, providing a common experience for each of areas listed in 26 of intents/contents, a leader's manual, supplementary discussion information.
D. Other Resources: None
E. Related Products:
   1. From same producer: Products included in Strategies of Organizational Change System.
   2. From other producers: NWRL Instructional Systems for Professional Development.
F. Time Span: Total of 10 sessions comprising minimum of 7 hours 40 minutes.
   Minimum: Two days (but probably not effective in such short time period).
   No more than two packets in any four-hour period.
   Optimum: Week-long workshops (as one of components) or spread out during school year.

- CONDITIONS OF USE

Although self-instructional and useful with broad range of groups, appears most useful if:
1. Groups who are/will be working together.
2. Leader has some prior understanding of group processes and some experience with this on similar workshop.

- ADAPTABILITY

Useful with broad range of groups.

- COST RANGE

Time of leader and group members. One kit for group - $94.75. Reproduction of consumable kit materials.

- REFERENCES: NIE Catalogue, page number 1096.

## STRATEGIES OF ORGANIZATIONAL CHANGE SYSTEM

- INTENDED USERS

A. Primary: Consultants, organization change specialists and other school personnel involved in planned change or improvement of organization effectiveness.
B. Secondary: Professors and students in educational fields.

- MAIN EMPHASES

1. Providing information and building understanding; skill/competency training; procedural guides/work aids.
2. Communication, problem solving, decision making, goal setting, conflict resolution, designing training, evaluating, providing support to organization change specialists.

- INTENTS/CONTENTS

1. Main goals:
   .Provide information and build understanding of important concepts and dimensions of organizational functioning.
   .Teach skills and procedures to enable school people to increase effectiveness of groups and organizations.
   .Build into the school system capacity for organizational development.
   .Provide school personnel with tools for evaluating what they are doing.
2. Main content areas:
   Substantive: Theory and technology for planning and implementing intervention in schools
   Procedural: (see Main Emphases, item 2.)

- MAIN ACTIVITIES

Reading and listening to presentations, participating in games, working in on-the-job situations.

- PROVISIONS FOR USE

A. Format: workshops, working in on-the-job situations.
B. Personnel: OD training intended for use by intact work systems.
C. Product Components:
   .Theory and research on organization development.
   .Technology for organization change specialists.
   .Descriptions and human support for organization change specialists.
D. Other Resources: None
E. Related Products: NWRL Instructional Systems for Professional Development--Component III, Objective Analysis and Planned Change; Component IV, Interpersonal Relations; Component V, Preparing Educational Training Consultants.
F. Time Span: See individual component.

- CONDITIONS OF USE

See individual component descriptions.

- ADAPTABILITY

See individual component descriptions.

- COST RANGE

See individual component descriptions.

- REFERENCES: NIE Catalogue, page number 1056.

## THEORY AND RESEARCH ON ORGANIZATION DEVELOPMENT AND CHANGE
(A Component of Strategies of Organizational Change System)

- INTENDED USERS

A. Primary: Consultants, organization change specialists, and other school personnel involved in planned change or improvement of organization effectiveness.
B. Secondary: Professors and students in educational fields.

- MAIN EMPHASES

Providing information and building understanding.

- INTENTS/CONTENTS

1. Main goals: Provide information and build understanding of important concepts and dimensions of organizational functioning, including information on applications of theory.
2. Main content areas: Theory and research findings.

- MAIN ACTIVITIES

Reading books, papers, and monographs reporting on theory and research findings.

- PROVISIONS FOR USE

A. Format: Can be used along or as part of an intervention in a school or to establish a cadre.
B. Personnel: Not applicable.
C. Product Components:
   .Bibliography: Reports of work program on strategies of organizational change.
   .Selected items from Bibliography (availability and costs indicated on Bibliography):
   a. R. Schmuck and P. Runkel, Organizational Training for a School Faculty.
   b. R. Schmuck and M. Miles. Organization Development in Schools.
   c. R. Schmuck, et al. Handbook of Organization Development in Schools.
   d. J. Phelps and R. Arends. Helping Parents and Educators Solve School Together.
   e. R. Schmuck. Bringing Parents and Students Into School Management.
   f. P. Runkel and R. Schmuck. Findings From the Research and Development Program on Strategies of Organizational Change.
   g. P. Runkel. Bibliography on Organizational Change in Schools.
   h. P. Runkel, et al. Organizational Specialists in a School District.
   i. R. Schmuck, et al. Consultation for Innovative Schools.
   j. M. Schwartz, et al. The Development of Educational Teams.
D. Other Resources: Other items also listed on Bibliography.
E. Related Products: From the same producer: Remaining components of system.
F. Time Span: Not applicable.

- CONDITIONS OF USE

Not applicable.

- ADAPTABILITY

May be used primarily for information or as background for using other components.

- COST RANGE

Cost of individual items included in bibliographic entries.

- REFERENCES: NIE Catalogue, page number 1056.

## TECHNOLOGY FOR ORGANIZATION CHANGE SPECIALISTS
(A Component of Strategies of Organizational Change System)

### ● INTENDED USERS

Consultants, organization change specialists, and groups of school personnel involved in planned change or improvement of organization effectiveness.

### ● MAIN EMPHASES

Interpersonal skill and understandings needed to accompany normative and structural change in the organizations.

### ● INTENTS/CONTENTS

1. Main goals: Teach skills and procedures to enable school personnel to increase effectiveness of groups and organizations with particular reference to planned change; provide school personnel with tools for diagnosing organizations and evaluating OD interventions.
2. Main content areas: Methodology for planning and implementing organizational change.

### ● MAIN ACTIVITIES

Reading or listening to presentations, experiential learning in task groups; data feedback, process consultation, working in on-the-job situations.

### ● PROVISIONS FOR USE

A. Format: Workshops or other interventions for task groups, working in on-the-job situations.

B. Personnel: A temporary system comprised of an OD specialist and an intact system.

C. Product Components:

.Presentations of information: Booklet, tape and audio-slide presentations available.

.Selected titles from Bibliography (availability and cost of each item included in Bibliography):

a. R. Schmuck, et al. Handbook of Organization Development in Schools.

b. R. Schmuck. Incorporating Survey Feedback in OD Interventions.

c. R. Schmuck, et al. Tailoring Consultation in Organization Development for Particular Schools.

(Note: Other items are listed in Bibliography available from producer.)

.Games available from Program on Strategies of Organization Change: Five square puzzle, planners and operators, card discovery problem.

.Miscellaneous consultant aids: handouts, instruments, exercises, simulations and procedures, lecturettes available at little or no cost.

D. Other Resources: None

E. Related Products: From the same producer: Other components of system.

F. Time Span: The time required for an OD intervention is always negotiated; approximately 25 hours for an intact work group seems minimal for first steps in interpersonal normative and structural change; cadres have been established with three weeks of training plus follow-up.

### ● CONDITIONS OF USE

Always negotiated between specialist and client group; intactness of organizational subsystem and commitment to intended intervention important; specialist assesses and builds organizational readiness to profit from intervention.

### ● ADAPTABILITY

Useful in variety of situations indicated in Intended Users.

### ● COST RANGE

Typical contracts with client groups include provisions for salaries or released time of specialists and clients; materials budget; major expenses of cadre on coordinator's salary; training and released time for specialist. Cost of individual items indicated in Bibliography available from producer.

● REFERENCES: NIE Catalogue, page number 1104.

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## DESCRIPTIONS AND HUMAN SUPPORT FOR ORGANIZATION CHANGE SPECIALISTS
(A Component of Strategies of Organizational Change System)

- INTENDED USERS

Organization Change Specialists.

- MAIN EMPHASES

Establishing cadres of OD specialists; skill/competency training for specialists; providing support for cadres and specialists.

- INTENTS/CONTENTS

1. Main goals: Build into school system the capacity for planned change and organization development.
2. Main content areas: Organization support systems.

- MAIN ACTIVITIES

Establishing cadre of organization change specialists within the school district, including selection, training and on-the-job coaching.

- PROVISIONS FOR USE

A. Format: Selection, training and on-the-job coaching of cadre.
B. Personnel: Team of trainees for a cross-role group of people in a district to establish a cadre.
C. Product Components:
    .Selected items from Bibliography (availability and cost of each item included in Bibliography).
    a. R. Arends and J. Phelps. Establishing Organizational Specialists Within School Districts.
    b. P. Runkel, et al. Organizational Specialists in a School District: Four Years of Innovation.
    c. S. Wyant. Organizational Development From the Inside: A Progress Report of the Cadre of Organizational Specialists.
    .Tape: Integrating organizational specialists into school districts.
    .List of persons involved with development in school districts of cadres of organization change specialists.
D. Other Resources: From same producer: Remaining components of system.
E. Related Products: None
F. Time Span: Cadres have been established with approximately three weeks of training plus follow-up.

- CONDITIONS OF USE

Always negotiated; cross-role, part-time nature of cadre with part or full-time coordinator.

- COST RANGE

Cost of individual items given in bibliographic entries; contracts for establishing cadres include salaries of trainees, some materials, salaries or release time for specialists in training, commitment to future support of cadres with coordinator salary and released time.

- REFERENCES: NIE Catalogue, page number 1106.

# CSE EVALUATION WORKSHOP I: AN ORIENTATION

## • INTENDED USERS

The Workshop is intended for groups of individuals assuming the following roles within education: administrators, evaluators, teachers, curriculum developers, researchers and developers of programs. It is also suitable for individuals assuming evaluator roles in social action programs outside of education.

## • MAIN EMPHASES

Evaluation Workshop I: An Orientation is directed toward two major goals:

- .participant understanding of the kinds of information an evaluation can provide for educational decision making
- .participant understanding of the general procedures and problems involved in selecting, collecting, analyzing, and reporting that information.

Familiarity with the processes of evaluation will, hopefully, bring with it the recognition that a thorough evaluation is worth the time, effort, and cost necessary to provide a decision base for program personnel at all levels.

## • INTENTS/CONTENTS

After completing the workshop, participants will be able to:

- .Name, describe, and properly sequence the major evaluation activities.
- .Identify appropriate data selection, collection, analysis, and reporting procedures for each major evaluation activity.
- .Identify proper and improper use of evaluation techniques, methodology, and design.
- .Identify the kinds of information that should be generated by each evaluation activity.
- .Identify the kinds of information that are needed before evaluation decisions can be made.
- .Identify the specific functions of the evaluator and those of the project director in each evaluation activity.

## • MAIN ACTIVITIES

CSE Workshops use a four-step method of presentation. These are: instruction, practice, feedback, and discussion. Activities involve simulation, role-playing, small-group discussion, solving evaluation problems, and so forth. The four steps are used so as to develop or improve participant skills in performing important evaluation activities. A major feature of the workshop is that it provides participants with an opportunity to perform evaluation activities and solve evaluation problems in a carefully controlled situation so that they become aware of their importance in and of themselves as well as their importance in relation to the evaluation effort as a whole.

## • PROVISIONS FOR USE

A. Format: Workshop

B. Personnel: Requires a leader who has previously participated in a workshop session. For the first session at a particular site, this requires a CSE or other consultant. For future sessions, a former participant within the district or other unit can serve as a leader.
Required: One qualified leader for every 30-45 participants.
Recommended: An assistant familiar with the workshop to assist when there are more than 30 participants.

C. Product Components: A Leader's Manual describing the step-by-step procedures for organizing and con--ducting the workshop; one participant's notebook containing instructional, reference, and reading materials; one set of exercies for each three participants; pre- and posttests for each participant.

D. Other Resources: A blackboard and other classroom equipment is recommended; refreshments and lunch served close to workshop location assists the leader in keeping with tight schedule.

E. Related Products:
- .Evaluation Workshop II: Needs Assessment
- .Evaluation Workshop IV: Implementation Evaluation
- .Evaluation Workshop V: Progress Evaluation

F. Time Span: two full days of instruction (approximately 14 hours).

- CONDITIONS OF USE

Prerequisite to conducting a workshop: An individual must have participated in a previous session or arranged to be otherwise certified for leadership by the developer.

The workshop can be used in a variety of organizational settings. Groups of individuals from a number of different organizations and levels of experience can participate in one session, an organization can use the materials to train its entire staff; a professor can use the materials in a course for graduate students. In most situations, a minimum of 21 individuals should participate. It is essential that the entire group of participants can participate in the entire session since teams of three work on exercises together throughout.

- ADAPTABILITY

The developer can arrange to conduct the workshop in conjunction with a longer evaluation training session which includes instruction tailored to a particular group's needs and interests.

- COST RANGE

Costs for the workshop vary with the number of participants, status of inventory, and according to the institutional affiliation of the leader (developer-supplied, on-site person, or independent consultant). Materials and leader time run from $25 to $50 per participant. Other costs may be incurred for room rental and released staff time. The workshop is available from CSE Field Services, Center for Study of Evaluation, UCLA Graduate School of Education, Los Angeles, California 90024.

- REFERENCES: NIE Catalogue, page number 972.

CSE 2

# CSE EVALUATION WORKSHOP II: NEEDS ASSESSMENT

## INTENDED USERS

The Workshop is intended for groups of individuals assuming the following roles within education: administrators, evaluators, teachers, curriculum developers, researchers and developers of programs. It is also suitable for individuals assuming evaluator roles in social action programs outside of education.

## MAIN EMPHASES

Evaluation Workshop II: Needs Assessment provides training in a variety of needs assessment techniques that can be used to identify potentially important educational objectives, to determine their relative importance, to develop a broad data base that will be used to establish priorities among important objectives, and to apply decision rules to make final objective selection.

## INTENTS/CONTENTS

The participants receive training in the following:

1. Outline the major phases of a needs assessment and match these with the key procedures and purposes of each phase.
2. Describe and evaluate the major methods for combining goal ratings for different raters.
3. Combine goal ratings from various subgroups to rank-order the goals.
4. List the major factors to consider in setting up a data collection system.
5. Set appropriate standards of student performance.
6. Identify which goal areas should be the focus of subsequent planning activities.

## MAIN ACTIVITIES

CSE Workshops use a four-step method of presentation. These are: instruction, practice, feedback, and discussion. Activities involve simulation, role-playing, small-group discussion, solving evaluation problems, and so forth. The four steps are used so as to develop or improve participant skills in performing important evaluation activities. A major feature of the workshop is that it provides participants with an opportunity to perform evaluation activities and solve evaluation problems in a carefully controlled situation so that they become aware of their importance in and of themselves as well as their importance in relation to the evaluation effort as a whole.

## PROVISIONS FOR USE

A. Format: Workshop

B. Personnel: Requires a leader who has previously participated in a workshop session. For the first session at a particular site, this requires a CSE or other consultant. For future sessions, a former participant within the district or other unit can serve as a leader.
Required: One qualified leader for every 30-45 participants.
Recommended: An assistant familiar with the workshop to assist when there are more than 30 participants.

C. Product Components: A Leader's Manual describing the step-by-step procedures for organizing and conducting the workshop; one participant's notebook containing instructional, reference, and reading materials; one set of exercises for each three participants; pre- and posttests for each participant.

D. Other Resources: A blackboard and other classroom equipment is recommended; refreshments and lunch served close to the workshop location assists the leader in keeping with the tight schedule.

E. Related Products:
.Evaluation Workshop I: An Orientation
.Evaluation Workshop IV: Implementation Evaluation
.Evaluation Workshop V: Progress Evaluation

F. Time Span: Two full days of instruction (approximately 14 hours).

## CONDITIONS OF USE

Prerequisite to conducting a workshop: An individual must have participated in a previous session or arranged to be otherwise certified for leadership by the developer.
The workshop can be used in a variety of organizational settings. Groups of individuals from a number of different

organizations and levels of experience can participate in one session, an organization can use the materials to train its entire staff; a professor can use the materials in a course for graduate students. In most situations, a minimum of 21 individuals should participate. It is essential that the entire group of participants can participate in the entire session since teams of three work on exercises together throughout.

- ADAPTABILITY

The developer can arrange to conduct the workshop in conjunction with a longer evaluation training session which includes instruction tailored to a particular group's needs and interests.

- COST RANGE

Costs for the workshop vary with the number of participants, status of inventory, and according to the institutional affiliation of the leader (developer-supplied, on-site person, or independent consultant). Materials and leader time run from $25 to $50 per participant. Other costs may be incurred for room rental and released staff time. The workshop is available from CSE Field Services, Center for Study of Evaluation, UCLA Graduate School of Education, Los Angeles, California 90024.

- REFERENCES: NIE Catalogue, page number 975.

# CSE EVALUATION WORKSHOP IV: IMPLEMENTATION EVALUATION

## INTENDED USERS

The Workshop is intended for groups of individuals assuming the following roles within education: administrators, evaluators, teachers, curriculum developers, researchers and developers of programs. It is also suitable for individuals assuming evaluator roles in social action programs outside of education.

## MAIN EMPHASES

Evaluation Workshop IV, Implementation Evaluation is designed to provide training in the procedures needed to conduct or participate in an implementation evaluation. These procedures are designed to help the evaluator determine the extent to which a program is being put into operation as planned and thus to provide decision makers with needed information about possible program modification.

## INTENTS/CONTENTS

After completing the workshop, participants will be able to:

1. Identify the jobs and roles of the person(s) responsible for conducting and supervising some or all of the activities associated with each stage of an educational evaluation.
2. Specify the purposes and characteristics of an implementation evaluation and show how they are related to other kinds of evaluation activities, especially those associated with progress evaluation.
3. Anticipate and detect discrepancies between a program plan and the operation of that program.
4. Select and construct appropriate instruments, such as an observation checklist and interview schedule, for use in collecting information about the nature and causes of discrepancies between a program plan and its implementation.
5. Identify and prepare implementation evaluation plans for reports that are likely to provide decision makers with needed information about educational programs.

## MAIN ACTIVITIES

CSE Workshops use a four-step method of presentation. These are: instruction, practice, feedback, and discussion. Activities involve simulation, role-playing, small-group discussion, solving evaluation problems, and so forth. The four steps are used so as to develop or improve participant skills in performing important evaluation activities. A major feature of the workshop is that it provides participants with an opportunity to perform evaluation activities and solve evaluation problems in a carefully controlled situation so that they become aware of their importance in and of themselves as well as their importance in relation to the evaluation effort as a whole.

## PROVISIONS FOR USE

A. Format: Workshop

B. Personnel: Requires a leader who has previously participated in a workshop session. For the first session at a particular site, this requires a CSE or other consultant. For future sessions, a former participant within the district or other unit can serve as a leader.
Required: One qualified leader for every 30-45 participants.
Recommended: An assistant familiar with the workshop to assist when there are more than 30 participants.

C. Product Components: A Leader's Manual describing the step-by-step procedures for organizing and conducting the workshop; one participant's notebook containing instructional, reference, and reading materials; one set of exercises for each three participants; pre- and posttests for each participant.

D. Other Resources: A blackboard and other classroom equipment is recommended; refreshments and lunch served close to workshop location assists the leader in keeping with the tight schedule.

E. Related Products:
.Evaluation Workshop I: An Orientation
.Evaluation Workshop II: Needs Assessment
.Evaluation Workshop V: Progress Evaluation

F. Time Span: Two days of instruction (approximately 12 hours).

- CONDITIONS OF USE

Prerequisite to conducting a workshop: An individual must have participated in a previous session or arranged to be otherwise certified for leadership by the developer.

The workshop can be used in a variety of organizational settings. Groups of individuals from a number of different organizations and levels of experience can participate in one session, an organization can use the materials to train its entire staff; a professor can use the materials in a course for graduate students. In most situations, a minimum of 21 individuals should participate. It is essential that the entire group of participants can participate in the entire session since teams of three work on exercises together throughout.

- ADAPTABILITY

The developer can arrange to conduct the workshop in conjunction with a longer evaluation training session which includes instruction tailored to a particular group's needs and interests.

- COST RANGE

Costs for the workshop vary with the number of participants, status of inventory, and according to the institutional affiliation of the leader (developer-supplied, on-site person, or independent consultant). Materials and leader time run from $25 to $50 per participant. Other costs may be incurred for room rental and released staff time. The workshop is available from CSE Field Services, Center for Study of Evaluation, UCLA Graduate School of Education, Los Angeles, California 90024.

- REFERENCES: NIE Catalogue, page number 975.

# CSE EVALUATION WORKSHOP V: PROGRESS EVALUATION

- INTENDED USERS

The Workshop is intended for groups of individuals assuming the following roles within education: administrators, evaluators, teachers, curriculum developers, researchers and developers of programs. It is also suitable for individuals assuming evaluator roles in social action programs outside of education.

- MAIN EMPHASES

Evaluation Workshop V, Progress Evaluation is designed to provide training in the skills that are essential to progress evaluation. The evaluator's major responsibilities in this evaluation stage are to select, collect, organize, analyze, and interpret information to decision makers on the extent to which an educational program is meeting its objectives while it is still in operation and can be modified where necessary.

- INTENTS/CONTENTS

After completing the workshop, participants will be able to:

1. Identify the jobs and roles of the person(s) responsible for conducting and supervising activities associated with each stage of an educational evaluation.
2. Specify the purposes and characteristics of a progress evaluation and show how they are related to other kinds of evaluation activities, especially those associated with implementation evaluation.
3. Identify the factors that influence the selection, collection, analysis, organization, and reporting of evaluation information.
4. Make decisions about the kinds of progress information to gather and the methods to be used in collecting, organizing, analyzing, and reporting that information.

- MAIN ACTIVITIES

CSE Workshops use a four-step method of presentation. These are: instruction, practice, feedback, and discussion. Activities involve simulation, role-playing, small-group discussion, solving evaluation problems, and so forth. The four steps are used so as to develop or improve participant skills in performing important evaluation activities. A major feature of the workshop is that it provides participants with an opportunity to perform evaluation activities and solve evaluation problems in a carefully controlled situation so that they become aware of their importance in and of themselves as well as their importance in relation to the evaluation effort as a whole.

- PROVISIONS FOR USE

A. Format: Workshop

B. Personnel: Requires a leader who has previously participated in a workshop session. For the first session at a particular site, this requires a CSE or other consultant. For future sessions, a former participant within the district or other unit can serve as a leader.
Required: One qualified leader for every 30-45 participants.
Recommended: An assistant familiar with the workshop to assist when there are more than 30 participants.

C. Product Components: A Leader's Manual describing the step-by-step procedures for organizing and conducting the workshop; one participant's notebook containing instructional, reference, and reading materials; one set of exercises for each three participants; pre- and posttests for each participant.

D. Other Resources: A blackboard and other classroom equipment is recommended; refreshments and lunch served close to workshop location assists the leader in keeping with the tight schedule.

E. Related Products:
.Evaluation Workshop I: An Orientation
.Evaluation Workshop II: Needs Assessment
.Evaluation Workshop IV: Implementation Evaluation

F. Time Span: Two full days of instruction (approximately 12 hours).

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- CONDITIONS OF USE

Preprequisite to conducting a workshop: An individual must have participated in a previous session or arranged to be otherwise certified for leadership by the developer.
The workshop can be used in a variety of organizational settings. Groups of individuals from a number of different organizations and levels of experience can participate in one session, an organization can use the materials to train its entire staff; a professor can use the materials in a course for graduate students. In most situations, a minimum of 21 individuals should participate. It is essential that the entire group of participants can participate in the entire session since teams of three work on exercises together throughout.

- ADAPTABILITY

The developer can arrange to conduct the workshop in conjunction with a longer evaluation training session which includes instruction tailored to a particular group's needs and interests.

- COST RANGE

Costs for the workshop vary with the number of participants, status of inventory, and according to the institutional affiliation of the leader (developer-supplied, on-site person, or independent consultant). Materials and leader time run from $25 to $50 per participant. Other costs may be incurred for room rental and released staff time. The workshop is available from CSE Field Services, Center for Study of Evaluation, UCLA Graduate School of Education, Los Angeles, California 90024

- REFERENCES: NIE Catalogue, page number 975.

# CSE ELEMENTARY SCHOOL EVALUATION KIT: NEEDS ASSESSMENT

## • INTENDED USERS

The Kit is designed to be used primarily by elementary school principals, with the participation of the school's parents, teachers, and community. It can be used by those with administrative roles at the district or regional level.

## • MAIN EMPHASES

The CSE Elementary School Evaluation Kit: Needs Assessment, developed as the first in a series of KITs on school evaluation, provides the elementary school principal with the needed systematic procedures and aids him or her in making informed, rational decisions as to the goals most appropriate for his or her school. While various sources of data on educational needs are tapped through the use of the KIT's procedures, the developer, recognizing the importance of the trend toward the use of community-derived information in the needs assessment process, has designed the KIT in such a manner as to make community involvement in needs assessment as meaningful, explicit, and systematic as possible. The procedures involved are designed to be relatively simple for the principal to establish and monitor.

## • INTENTS/CONTENTS

The KIT provides step-by-step instruction and materials for the user to go through the steps in a needs assessment:

1. The KIT provides the principal with procedures to gather information as to the goals his/her school should be meeting.
2. The KIT instructs the principal in selecting tests to measure student performance on highly rated goals.
3. The needs assessment KIT provides the principal with an effective way of interpreting the school's test scores in relation to those of other schools with similar characteristics
4. The last step shows the principal how to use a decision model to transform the information already gathered into a set of critical need areas for his school.

## • MAIN ACTIVITIES

Using the KIT the following activities occur:

1. Principal decides grade level(s) for which goals will be selected.
2. Principal identifies groups to be represented. Suggested sampling methods are included. The principal has the option of not including other viewpoints.
3. A method for collecting information is decided--in groups, individually (mailed questionnaires), or by a combination of both.
4. Using a list of 106 goals and any others identified, participants rate each on a five-point scale (most important to unimportant).
5. Principal, using simple mathematical procedures, tallies, averages, and ranks goals for each group.
6. An interim report is compiled and distributed to participants.
7. Professional staff, working through the kits, select appropriate tests for goal areas.
8. Tests are administered and results interpreted. Sampling procedures and information for interpreting results are included.
9. Principal, using guidelines recommended, identifies goal areas of greatest priority.

## • PROVISIONS FOR USE

A. Format: The Needs Assessment KIT is a tool for a principal working on-the-job.

B. Personnel:
Required: Principal with limited clerical assistance.
Recommended: Most of the options in the KIT recommend the participation of school staff and parents.

C. Product Components:
Required: The following are packaged in one large box: guidebook; teachers' and parents' card sort; goal assessment set, including 10 decks of 106 goal cards, each card describing a different goal; 10 sets of rating mats (5 per set) marked "unimportant," "marginal importance," "average importance," "moderate importance," and "most important"; 50 rating forms for tallying the goals; parents' goal rating questionnaire (48 copies)

contains the same 106 goal statements presented on the goal cards. Both the assessment set and the questionnaires include instructions on their use. Available: Additional copies of consumables.

D. Other Resources: None

E. Related Products: None

F. Time Span: None

- ADAPTABILITY

The KIT can be used in preservice training.

- COST RANGE

The complete KIT costs $114.95. This includes the Guidebook; 24 copies (4 for each grade level) of the Principal's Goal Rating Form; 48 copies of Parents' Goal Rating Questionnaires; 10 decks of Goal Cards (106 cards per deck; 10 sets of Rating Mats (5 per set); and 50 Goal Card Tally Sheets. One complete KIT is available on a 30-day approval basis. Individual components of the KIT are available in the following lots and prices:

| | |
|---|---|
| .Questionnaire (48 copies) | $8.95 |
| .Principal's Goal Rating Form (24 copies) | $6.95 |
| .Goal Card Tally Sheets (50 copies) | $6.95 |
| .Rating Mats and Goal Cards (10 sets) | $29.95. |

The Guidebook is not distributed separately.

The KIT is available from CSE Field Services, Center for Study of Evaluation, UCLA Graduate School of Education, Los Angeles, California 90024.

- REFERENCES: NIE Catalogue, page number 967.

## CSE SUMMATIVE EVALUATION KIT

The Kit is part of the CSE Elementary School Evaluation Kit Series, though it can be used completely independently of the other kits.

### • INTENDED USERS

The Summative Evaluation Kit is intended for use by anyone given the task of designing and carrying out a program evaluation. This person might be a classroom teacher, a principal, a director of specially funded programs, or a district evaluator.

### • MAIN EMPHASES

The Kit is a set of procedural guides containing step-by-step instructions for accomplishing major tasks involved in conducting a program evaluation, for example, planning the evaluation, articulating goals, selecting a design, measuring achievement. The Kit contains an audio tape describing evaluation tasks whose secondary purpose is to change attitudes--or at least ease apprehension--toward evaluation. Since the Kit contains explanations for the procedures it recommends, and a good bit of conceptualization about the roles and duties of the evaluator, one of its major objectives is providing information about major evaluation concepts and building understanding of the job of the program evaluator.

### • INTENTS/CONTENTS

The main goals of the CSE Summative Evaluation Kit are both procedural and substantive. The Kit aims to improve practice in evaluation by providing local practitioners with step-by-step procedures for accomplishing their own evaluations. Use of the Kit should make the local evaluator more independent of outside consultant help, and educate him/her about the procedures needed to perform a summative evaluation. Since the Kit contains a substantial amount of conceptual information, its use should make the practitioner more conversant about major concepts and issues in evaluation and measurement. In addition to its directive function, the Kit can and has been used as the basis of workshops and whole courses on the topic of evaluation and educational research.

### • MAIN ACTIVITIES

Users of the Kit listen to an introductory tape which describes the CSE Evaluation Model, discusses the value of evaluation as a basis for rational decision-making in the schools, outlines the roles an evaluator might assume, and discusses the use of design in evaluation. An accompanying booklet illustrates the concepts described in the tape. The tape assists the use to use one of two Step-by-Step Guides to direct the planning and execution of the evaluation. The "Step-by-Step Guide for the Evaluation of Pull-Out Programs" fits evaluation situations where a set of preconditions including defining target groups and program cycles can be met. It then directs the conduct of an entire evaluation, start to finish, providing statistical test procedures and a final report outline to fit the design used. The longer "Step-by-Step Guide for Conducting a Summative Evaluation" is designed to fit any program evaluation situation. Its user proceeds by filling out worksheets defining the program and requestting the results of evaluation activities. At points in the Guide where expertise is needed to make a decision, or where a particular procedure needs to be carried out (such as selecting an evaluation design, or constructing a criterion-referenced test) the user is referred to one of the Kit's eight "How to" booklets. These booklets cover the following topics:

1. How to Select a Design, Display and Interpret Results
2. How to Randomize
3. How to Articulate Goals, Outcomes, and Objectives
4. How to Measure Achievement
5. How to Measure Attitudes
6. How to Document the Program
7. How to Calculate Statistics and Also Understand Them
8. How to Present an Evaluation Report

The "How to" booklets contain step-by-step procedures for performing program evaluation tasks, and also provide non-technical background information concerning why and what the procedures accomplish, as well as advice for overcoming logistical and attitudinal stumbling blocks often encountered in evaluation and measurement. Using the Step-by-Step Guides, the "How to" booklets, an accompanying Measurement Wall Chart, and a Handy Randomizing Deck of cards, the Kit user can engage in every activity needed for a program evaluation. On the other hand, a person who does not need extensive guidance in conducting an evaluation, or whose task is formative evaluation or merely the design of a measurement instrument can easily use the Kit as a reference source, consulting Guides and "How to" booklets to meet particular needs.

- PROVISIONS FOR USE

A. Format: Can be used as a self-help tool, in on-the-job situations by groups or individuals entrusted with an evaluation, or it can be used as a training tool in a workshop or course setting.
B. Personnel: The Kit requires no one to assist the on-the-job user. Courses and workshops using the Kit should be run by someone with some evaluation and/or measurement training.
C. Product Components: The entire 10-booklet set with ancillary materials is best used intact.
D. Other Resources:
Required: None. The Kit is designed to exhaustively treat the topic.
E. Related Products:
.CSE Elementary School Needs Assessment Kit (Allyn & Bacon)
.CSE Elementary School Program Planning Kit (in press)
F. Time Span: Time span and extent of Kit use is completely determined by the user.

Kit users are expected to have mastered basic algebra and have available a tape cassette player and a hand calculator.

- CONDITIONS OF USE

Kit users in on-the-job settings should have a commitment to spending time conducting a quality evaluation.

- ADAPTABILITY

Though designed for on-the-job use, the Kit can be adopted as a course or workshop text. Use of the Kit in this manner demands that the instructor be familiar with the Kit's contents, have some minimal training in issues and concepts in program evaluation, measurement, and educational research, and have the commitment and ability to structure workshop experiences or college courses. In addition to purely summative evaluation, the Kit has been extensively used by formative evaluators and by persons conducting needs assessments. This has been possible because many of the procedures described in the Kit are generalizable over a wide range of evaluation-related tasks. The Kit's introductory tape has been used in some settings as an introduction to evaluation for program personnel and evaluation staff. The line-drawing illustrations from the accompanying booklet have lent themselves to easy reproduction on overhead transparencies. Though the Kit is part of an "elementary" school evaluation series, its procedures, with little modification, have been used in secondary and even non-educational settings.

- COST RANGE

The Kit costs approximately $35.00 (to be determined May 15, 1976). No consultative personnel are needed.
The KIT is available from CSE Field Services, Center for Study of Evaluation, UCLA Graduate School of Education, Los Angeles, California 90024.

- REFERENCES: NIE Catalogue, page number 967.

CSE ELEMENTARY SCHOOL TEST EVALUATIONS

- INTENDED USERS

This book is designed for use by principals, evaluators, project directors, and other state, regional or local educators concerned with testing of students in grades 1-6. Secondary users include researchers, graduate students, test publishers, and libraries and resource centers.

- MAIN EMPHASES

The CSE Elementary School Test Evaluations is a compendium of tests, keyed to educational goal areas, and evaluated for the characteristics of Measurement Validity, Examinee Appropriateness, Administrative Usability, and Normed Technical Excellence (the MEAN evaluation procedure). Ratings for each category are presented for each test. The book contains indexes of both tests and goals to assist users in locating published tests most suitable for their needs.

- INTENTS/CONTENTS

This book contains evaluations of virtually every output measure (test) published that is generally available to educators and researchers for use in testing elementary schools, programs, and students. Over a thousand output measures were evaluated by measurement experts and educators using the MEAN evaluation procedure. Each of these four main categories is broken down into subcategories. For example, Measurement Validity contains two subcategories: (1) Content and construct, and (2) Concurrent and Predictive. The introduction to the book defines and explains the MEAN evaluation method. A poor, fair, or good rating is assigned to each of the four main categories, a rating that has been derived from summarizing the subcategories. For example, one test in spelling for third grade is rated poor in Measurement Validity, fair in Examinee Appropriateness, good in Administrative Usability, and poor in Normed Technical Excellence. The results of the evaluation of each output measure were largely determined by the purpose that particular measure was to serve. Specifically, each measure was classified as to its educational goal, and then its effectiveness in assessing achievement of that goal was evaluated. The measures were judged on their appropriateness to school situations, not to clinical or research problems.

- MAIN ACTIVITIES

A. The CSE Elementary School Test Evaluations is a reference tool. The primary use of the book is as a source of tests keyed to goals that have high priority as determined by a community-based needs assessment or other procedure. However, the information is presented so that it can be used for a variety of purposes.

B. Among the secondary uses of the book are the following:
  - .validation of test selection decisions based on information obtained from other sources
  - .selection of areas for test development by researchers and publisher research departments
  - .graduate study in education and measurement
  - .justification of local test development where the book indicates that no good tests exist

- PROVISIONS FOR USE

A. Format: Soft-cover reference book

B. Personnel: Book requires no one to assist an individual on-the-job user

C. Product Components:
Required: One copy of the book per user or per group of individuals using a common reference or testing library

D. Other Resources:
Required: None
Recommended: Specimen sets of selected tests (Publisher addresses are listed in the book)

E. Related Products: Individuals selecting tests at other grade/age levels will want to consult:
  - .CSE/RBS Test Evaluations: Tests of Higher-Order Cognitive, Affective, and Interpersonal Skills
  - .CSE Secondary School Test Evaluations
  - .CSE/ECRC Preschool/Kindergarten Test Evaluations
  - .Tests of Functional Adult Literacy: An Evaluation of Currently Available Instruments (published by Northwest Regional Laboratory)

F. Time Span: Approximately two hours are required to read the introductory materials and thoroughly examine the book. Only a few minutes are needed to look up an individual test or goal area.

- CONDITIONS OF USE

No measurement background is required to use the book. If an individual is selecting a test, for a particular grade or age level, to measure an instructional program's success in teaching a specified educational objective, the book provides simple, easy to read, and reliable information on tests which the individual could confidently use to select the best test. If an individual user had a purpose for using the test evaluations, other than for program evaluation, the user might not want to rely on the four letter grades given to each test. In anticipation of such situations, the developers have included the 24 sub-ratings used to determine the letter grades. The user can attend only to those sub-ratings which are relevant to the particular test selection/problem or other purpose for using the information. The book's introduction clearly indicates that the tests are evaluated for program evaluation purposes; no claims are made that the evaluations are sensitive to racial, ethnic, or other minority groups for individual pupil placement.

- ADAPTABILITY

The volume is useful for clerical staff responsible for ordering tests.

- COST RANGE

The 1970 edition is $5.00 per copy. The 1975 edition (Spring 1976) will be approximately $10.00.
The book is available from CSE Field Services, Center for Study of Evaluation, UCLA Graduate School of Education, Los Angeles, California 90024.

- REFERENCES: NIE Catalogue, page number 987.

# CSE SECONDARY SCHOOL TEST EVALUATIONS

## INTENDED USERS

This book is designed for use by principals, evaluators, project directors, department chairman, and other state, regional or local educators concerned with testing of students in grades 7-12. Secondary users include researchers, graduate students, test publishers, and libraries and resource centers.

## MAIN EMPHASES

The CSE Secondary School Test Evaluations is a compendium of tests, keyed to educational goal areas, and evaluated for the characteristics of Measurement Validity, Examinee Appropriateness, Administrative Usability, and Normed Technical Excellence (the MEAN evaluation procedure). Ratings for each category are presented for each test. Each of the three volumes contains indexes of both tests and goals to assist users in locating published tests most suitable for their needs.

## INTENTS/CONTENTS

This publication contains evaluations of virtually every output measure (test) published that is generally available to educators and researchers for use in testing schools, programs, and students in grades 7-12. Over 5,400 subscales of 1167 tests were evaluated by measurement experts and educators using the MEAN evaluation procedure. Each of these four main categories is broken down into subcategories. For example, Measurement Validity contains two subcategories: (1) Content and Construct, and (2) Concurrent and Predictive. The introduction to the book defines and explains the MEAN evaluation method. A poor, fair, or good rating is assigned to each of the four main categories, a rating that has been derived from summarizing the subcategories. For example, one test in Number Concepts, Systems, and Sets for grades 7-8 is rated fair (F) in Measurement Validity, good (G) in Examinee Appropriateness, fair (F) in Administrative Usability, and fair (F) in Normed Technical Excellence. The results of the evaluation of each output measure were largely determined by the purpose that particular measure was to serve. Specifically, each measure was classified as to its educational goal, and then its effectiveness in assessing achievement of that goal was evaluated. The measures were judged on their appropriateness to school situations, not to clinical or research problems.

## MAIN ACTIVITIES

A. The CSE Secondary School Test Evaluations are reference tools. The primary use of the volumes is as a source of tests keyed to goals that have high priority as determined by a community-based needs assessment or other procedure. However, the information is presented so that it can be used for a variety of purposes.

B. Among the secondary uses of the book are the following:
- .validation of test selection decisions based on information obtained from other sources
- .selection of areas for test development by researchers and publisher research departments
- .graduate study in education and measurement
- .justification of local test development where the book indicates that no good tests exist
- .source of test publisher addresses and test titles

## PROVISIONS FOR USE

A. Format: Three soft-cover reference books.

B. Personnel: Publication requires no one to assist an individual on-the-job user

C. Product Components:
Required: One set per user or per group of individuals using a common reference or testing library

D. Other Resources:
Required: None
Recommended: Specimen sets of selected tests (Publisher addresses are listed in the book)

E. Related Products: Individuals selecting tests at other grade/age levels will want to consult:
- .CSE/RBS Test Evaluations: Tests of Higher-Order Cognitive, Affective, and Interpersonal Skills
- .CSE Elementary School Test Evaluations
- .CSE/ECRC Preschool/Kindergarten Test Evaluations

.Tests of Functional Adult Literacy: An Evaluation of Currently Available Instruments (published by Northwest Regional Laboratory

F. Time Span: Approximately two hours are required to read the introductory materials and thoroughly examine one volume. (The introductory material is repeated in each volume.) Only a few minutes are needed to look up an individual test or goal area.

- CONDITIONS OF USE

No measurement background is required to use the book. If an individual is selecting a test, for a particular grade or age level, to measure an instructional program's success in teaching a specified educational objective, the book provides simple, easy to read, and reliable information on tests which the individual could confidently use to select the best test. If an individual user had a purpose for using the test evaluations, other than for program evaluation, the user might not want to rely on the four letter grades given to each test. In anticipation of such situations, the developers have included the 39 sub-ratings used to determine the letter grades. The user can attend only to those sub-ratings which are relevant to the particular test selection/problem or other purpose for using the information. The book's introduction clearly indicates that the tests are evaluated for program evaluation purposes; no claims are made that the evaluations are sensitive to racial, ethnic, or other minority groups for individual pupil placement.

- ADAPTABILITY

The volumes are useful for clerical staff responsible for ordering tests.

- COST RANGE

The three volumes are available only as a set; cost is $22.00.
They can be obtained from CSE Field Services, Center for Study of Evaluation, UCLA Graduate School of Education, Los Angeles, California 90024.

- REFERENCES: NIE Catalogue, page number 989.

# CSE-ECRC PRESCHOOL/KINDERGARTEN TEST EVALUATIONS

## INTENDED USERS

This book is designed for use by principals, evaluators, project directors, and other state, regional or local educators concerned with testing of students 30 months through six years of age. Secondary users include researchers, graduate students, test publishers, and libraries and resource centers.

## MAIN EMPHASES

The CSE-ECRC Preschool/Kindergarten Test Evaluations is a compendium of tests, keyed to educational goal areas, and evaluated for the characteristics of Measurement Validity, Examinee Appropriateness, Administrative Usability, and Normed Technical Excellence (the MEAN evaluation procedure). Ratings for each category are presented for each test. The book contains indexes of both tests and goals to assist users in locating published tests most suitable for their needs.

## INTENTS/CONTENTS

This book contains evaluations of virtually every output measure (test) published that is generally available to educators and researchers for use in testing preschool and kindergarten programs and students. All tests were evaluated by measurement experts and educators using the four part MEAN evaluation procedure. Each of these four main categories is broken down into subcategories. For example, Measurement Validity contains two subcategories: (1) Content and Construct, and (2) Concurrent and Predictive. The introduction to the book defines and explains the MEAN evaluation method. A poor, fair, or good rating is assigned to each of the four main categories, a rating that has been derived from summarizing the subcategories. For example, one test is rated fair (F) in Measurement Validity, poor (P) in Examinee Appropriateness, good in Administrative Usability, and poor (P) in Normed Technical Excellence. The results of the evaluation of each output measure were largely determined by the purpose that particular measure was to serve. Specifically, each measure was classified as to its educational goal, and then its effectiveness in assessing achievement of that goal was evaluated. The measures were judged on their appropriateness to school situations, not to clinical or research problems.

## MAIN ACTIVITIES

A. The CSE-ECRC Preschool/Kindergarten Test Evaluations is a reference tool. The primary use of the book is as a source of tests keyed to goals that have high priority as determined by a community-based needs assessment or other procedure. However, the information is presented so that it can be used for a variety of purposes.

B. Among the secondary uses of the book are the following:
- .validation of test selection decisions based on information obtained from other sources
- .selection of areas for test development by researchers and publisher research departments
- .graduate study in education and measurement
- .justification of local test development where the book indicates that no good tests exist
- .source of test publisher addresses and test titles

## PROVISIONS FOR USE

A. Format: Soft-cover reference book

B. Personnel: Book requires no one to assist an individual on-the-job user

C. Product Components:
Required: One copy of the book per user or per group of individuals using a common reference or testing library

D. Other Resources:
Required: None
Recommended: Specimen sets of selected tests (publisher addresses are listed in the book)

E. Related Products: Individuals selecting tests at other grade/age levels will want to consult:
- .CSE/RBS Test Evaluations: Tests of Higher-Order Cognitive, Affective, and Interpersonal Skills
- .CSE Secondary School Test Evaluations
- .CSE Elementary School Test Evaluations
- .Tests of Functional Adult Literacy: An Evaluation of Currently Available Instruments (published by Northwest Regional Laboratory

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F. **Time Span**: Approximately two hours are required to read the introductory materials and thoroughly examine the book. Only a few minutes are needed to look up an individual test or goal area.

- CONDITIONS OF USE

No measurement background is required to use the book. If an individual is selecting a test, for either preschool or kindergarten, to measure an instructional program's success in teaching a specified educational objective, the book provides simple, easy to read, and reliable information on tests which the individual could confidently use to select the best test. If an individual user had a purpose for using the test evaluations, other than for program evaluation, the user might not want to rely on the four letter grades given to each test. In anticipation of such situations, the developers have included the 25 sub-ratings used to determine the letter grades. The user can attend only to those sub-ratings which are relevant to the particular test selection/problem or other purpose for using the information.

The book's introduction clearly indicates that the tests are evaluated for program evaluation purposes; no claims are made that the evaluations are sensitive to racial, ethnic, or other minority groups for individual pupil placement.

- ADAPTABILITY

The volume is useful for clerical staff responsible for ordering tests.

- COST RANGE

CSE-ECRC Preschool/Kindergarten Test Evaluations cost $5.00 per copy. They are available from CSE Field Services, Center for Study of Evaluation, UCLA Graduate School of Education, Los Angeles, California 90024.

- REFERENCES: NIE Catalogue, page number 985.

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# CSE-RBS TEST EVALUATIONS: TESTS OF HIGHER-ORDER COGNITIVE, AFFECTIVE, AND INTERPERSONAL SKILLS

## • INTENDED USERS

The CSE-RBS Test Evaluations were originally completed for use by the Humanizing Learning Program of RBS according to a set of taxonomies developed for that program, but they are expected to be of assistance to (1) educators in the development and assessment of innovative goals and programs and (2) researchers, psychometricians, and test publishers in identifying areas for which adequate instrumentation does not exist.

## • MAIN EMPHASES

The goal of the CSE-RBS Test Evaluations is to provide information on the quality and existence of tests in the areas of higher-order cognitive, affective, and interpersonal skills.

## • INTENTS/CONTENTS

The CSE-RBS Test Evaluations is a single volume composed of evaluation ratings of some 2610 scales and subscales considered to test skills in the higher-order cognitive, affective, and interpersonal areas. Each instrument is categorized into a cell of one of the 3 taxonomies and is given a numerical rating and a letter grade (Good, Fair, Poor) on each of the following characteristics: Validity, Examinee appropriateness (appropriateness for the intended examinee group), Normed excellence, Teaching feedback, Usability, and Retest potential, and comments are made on the instrument's Ethical propriety. The CSE acronym for this system is VENTURE and the first portion of the book is devoted to a discussion of the components of each rating. For example, the system generally gives highest usability ratings to instruments which may be large-group administered in less than 20 minutes by a single observer without extensive practice.

The instruments are arranged by skill area and subskill, and are alphabetically listed within each subskill. Each skill area is introduced by a description of the taxonomy against which the instruments were matched. The cognitive taxonomy is a grid of skill (e.g., classifying) against content (e.g., verbal-semantic). That of affective domain is 3-dimensional: affective characteristic against type of measure (e.g., self-report) against type of report (e.g., speculative). The interpersonal taxonomy is 4-dimensional with type of relation (e.g., with peers) mapped against location (e.g., at home) against type of measure against type of report. The instruments are identified by name, form, age range, and the initials of the publisher (or author, in the case of unpublished tests). An index of tests and an index of publishers are included.

## • MAIN ACTIVITIES

A. The CSE-RBS Test Evaluations is a reference tool. The primary use of the book is as a source of tests keyed to goals in humanizing learning curricula. However, the information is presented so that it can be used for a variety of purposes.

B. Among the secondary uses of the book are the following:
- .validation of test selection decisions based on information obtained from other sources
- .stimulus for test development by researchers and publisher research departments
- .graduate study in education and measurement
- .justification of local test development where the book indicates that no good tests exist
- .source of test publisher addresses and test titles.

## • PROVISIONS FOR USE

A. Format: Soft-cover reference book

B. Personnel: Book requires no one to assist an individual on-the-job user

C. Product Components:
Required: One copy of the book per user or per group of individuals using a common reference or testing library.

D. Other Resources:
Required: None
Recommended: Specimen sets of selected tests (publisher addresses and addresses of developers for unpublished instruments are listed in the book)

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E. Related Products: Individuals selecting tests at other grade/age levels will want to consult:
- .CSE Elementary School Test Evaluations
- .CSE Secondary School Test Evaluations
- .CSE/ECRC Preschool/Kindergarten Test Evaluations
- .Test of Functional Adult Literacy: An Evaluation of Currently Available Instruments (published by Northwest Regional Laboratory)

Curriculum packages for higher-order cognitive, affective, and interpersonal skills have been developed by the Humanizing Learning Program at Research for Better Schools, Inc.

F. Time Span: Approximately three hours are required to read the introductory materials and thoroughly examine the book. Approximately 30 minutes are needed to examine the list of tests in each goal area.

- CONDITIONS OF USE

No measurement background is required to use the book. If an individual is selecting a test, for a particular skill area, the book provides simple, easy to read, and reliable information on tests. If the individual user had a purpose for using the test evaluations, other than for program evaluation, the user might not want to rely on the six grades given to each test. Individual test evaluations are the focus of the product. CSE, however, included an analysis of the aggregate of tests on each of the VENTURE evaluation criteria which gives fuller information on cell deficiencies to psychometricians and test publishers.

- ADAPTABILITY

The volume is useful for clerical staff responsible for ordering tests.

- COST RANGE

CSE-RBS Test Evaluations costs $8.50 per copy and is available from CSE Field Services, Center for Study of Evaluation, UCLA Graduate School of Education, Los Angeles, California 90024.

- REFERENCES: NIE Catalogue, page number 983.

## DETERMINING INSTRUCTIONAL PURPOSES: UNIT 1 - SETTING GOALS

(First Unit in the Determining Instructional Purposes Training Package and One of Five Units in the Far West Laboratory for Educational Research and Development Educational Management Training Series.)

### • INTENDED USERS

Primary: Assistant superintendents, curriculum directors, principals, department heads, and lead teachers involved in long-range instructional planning and decision-making at grades K-12.
Secondary: Graduate students training for administrative credentials and positions.

### • MAIN EMPHASES

Improved knowledge of and attitudes toward deriving district goals; also actual refinement of goals that reflect the preferences and needs of students, parents, and other school-related groups.

### • INTENTS/CONTENTS

The training material is organized in separate modules consisting of reading assignments, input materials, worksheets, and written feedback.

Setting Goals is divided into four modules, each concerning a specific skill necessary for formulating a district goal statement. These are:

.Deriving District Goals
.Refining Goals into Goal Indicators
.Screening Sets of Goal Indicators
.Prioritizing Goal Indicators.

An appendix contains: Suggested Guidelines for Obtaining Community Involvement in a Goals Effort.

### • MAIN ACTIVITIES

The unit is designed so that participants function on their own, either individually or in groups, much of the time. A coordinator acts as an organizer, guide, and monitor. The training material in each unit is organized in separate modules consisting of reading assignments, input materials, worksheets, and written feedback. Immediate feedback is provided in self-test exercises by comparing the participant's responses with suggested responses. Since worksheets are supposed to reflect team consensus, the work done by each individual is not considered done until another team member has reviewed it. At the end of each module, teams exchange comments on the training activities and discuss problems they encountered. The developers suggest giving additional assignments individually, so that participants can use the process learned in real-life school situations of their own chosing and write a paper describing the process used.

### • PROVISIONS FOR USE

A. Format: Workshop or course.
B. Personnel: A coordinator who acts as an organizer, guide, and monitor is essential if the training units are to achieve their intended results. The coordinator should be an administrator in a school or district, or a professor for a university-based course. Neither the participants nor the coordinator need be proficient in instructional planning and management, but they should be familiar with the operations of schools.
C. Product Components:
Required: Setting Goals. A loose-leaf student manual. Coordinator Handbook. Provides instructions for conducting the workshop, information on the development of the training unit, and detailed instructions about the activities of all three units in the Determining Instructional Purposes package.
D. Other Resources: The unit is self-contained.
E. Related Products: Setting Goals is one of three related units in the Determining Instructional Purposes training package. The other two units are: Analyzing Problems and Deriving Objectives. Two related products in the Far West Laboratory series are Designing Instructional Programs and Evaluation for Program Improvement. The RBS Handbook of Comprehensive Planning in Schools, the CEPM Community-Based Broad Goal Definition are other related products.
F. Time Span: A minimum of 10 to 15 hours is required for the completion of the unit, with an estimated time of two to three hours per module. The total time

varies with particular groups depending on their motivation, level of skills, and how thoroughly they want to cover the skills. Workshops can be either in small segments lasting from one to three hours or concentrated in a two- or three-day session. The Coordinator Handbook offers suggestions for alternate scheduling.

- CONDITIONS OF USE

Each unit is a self-contained training tool designed to incorporate into the course or workshop as many facets of an actual school setting as possible. The Setting Goals unit demonstrates how establishing priorities lays a sound foundation for allocating time, money, and energy. The simulation materials provide a common working base for participants from different school backgrounds, and some of the exercises project anticipate community input. The materials have been deliberately designed to afford great flexibility in scheduling of time of each unit, in the sequence in which units are taken, in the setting for training, and in the number of participants that can be trained in one workshop. Groups may be composed in various ways depending on the specific application.

- ADAPTABILITY

Setting Goals treats comprehensive K-12 school district goals. Aside from the variety of illustrations drawn from K-12 district and school settings, the processes of goal setting could be easily adapted to any instructional setting without regard to grade level, curriculum content, or organizational unit.

- COST RANGE

Coordinator Handbook, $4.95, available from Far West Laboratory, 1855 Folsom Street, San Francisco, California 94103. Participant Manual, Setting Goals, $10.00, available from the Association of California School Administrators (ACSA), 1575 Old Bayshore Highway, Burlingame, California 94010.

- REFERENCES: NIE Catalogue, page number 1156.

## DETERMINING INSTRUCTIONAL PURPOSES: UNIT 2 - ANALYZING PROBLEMS

(Second Unit in the Determining Instructional Purposes Training Package and One of Five Units in the Far West Laboratory for Educational Research and Development Educational Management Training Series.)

### ● INTENDED USERS:

Primary: Assistant superintendents, curriculum directors, principals, department heads, and lead teachers involved in long-range instructional planning and decision-making at grades K-12.
Secondary: Graduate students training for administrative credentials and positions.

### ● MAIN EMPHASES

Sharpening skills in identifying instructional problems and defining problems using existing and desired outcomes (needs assessment); collecting information needed to analyze problems; and determining the validity and relative seriousness of problems.

### ● INTENTS/CONTENTS

The training material is organized in separate modules consisting of reading assignments, input materials, worksheets, and written feedback.

Analyzing Problems is divided into six modules, each concerning a specific skill necessary for dealing with how to determine which of the many problems that instructional planners face most deserve their attention. The six modules are:
.Which problem signals warrant further analysis?
.What problems do the signals imply?
.What additional information is needed?
.How should the information be collected?
.Are the problems valid?
.If they are valid, how serious are the problems?

### ● MAIN ACTIVITIES

The unit is designed so that participants function on their own, either individually or in groups, much of the time. A coordinator acts as an organizer, guide, and monitor. The training material in each unit is organized in separate modules consisting of reading assignments, input materials, worksheets, and written feedback. Immediate feedback is provided in self-test exercises by comparing the participant's responses with suggested responses. Since worksheets are supposed to reflect team consensus, the work done by each individual is not considered done until another team member has reviewed it. At the end of each module, teams exchange comments on the training activities and discuss problems they encountered. The developers suggest giving additional assignments individually, so that participants can use the process learned in real-life school situations of their own chosing and write a paper describing the process used.

### ● PROVISIONS FOR USE

A. Format: Workshop or course.
B. Personnel: A coordinator who acts as an organizer, guide, and monitor is essential if the training units are to achieve their intended results. The coordinator should be an administrator in a school or district, or a professor for a university-based course. Neither the particpants nor the coordinator need be proficient in instructional planning and management, but they should be familiar with the operations of schools.
C. Product Components:
Required: Analyzing Problems. A loose-leaf student manual. Coordinator Handbook. Provides instructions for conducting the workshop, information on the development of the training unit, and detailed instructions about the activities of all three units in the Determining Instructional Purposes package.
D. Other Resources: The unit is self-contained.
E. Related Products: Analyzing Problems is one of three related units in the Determining Instructional Purposes training package. The other two units are: Setting Goals and Deriving Objectives. Two related products in the Far West Laboratory series are Designing Instructional Programs and Evaluation for Program Improvement; also the RBS Handbook of Comprehensive Planning in Schools, Surveying Your Community, and Pupil-Perceived Needs.

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F. Time Span: A time span of 12 to 18 hours is required for the completion of the unit, with an estimated time of two to three hours per module. The total time varies with particular groups depending on their motivation, level of skills, and how thoroughly they want to cover the skills. Workshops can be either in small segments lasting from one to three hours or concentrated in a two- or three-day session. The Coordinator Handbook offers suggestions for alternate scheduling.

- CONDITIONS OF USE

Each unit is a self-contained training tool designed to incorporate into the course or workshop as many facets of an actual school setting as possible. Analyzing Problems enables participants to learn long-range planning techniques, but the unit is not designed to deal with crisis or confrontation situations. The advantages of the approach include: (1) effective use of time and resources by treating problems in order of priority, (2) the establishment of realistic goals and objectives from which student outcomes become clearer; (3) communication within staff regarding problems, and (4) communication to the community of the school's order of priorities. The materials have been deliberately designed to afford great flexibility in scheduling of time for each unit, in the sequence in which units are taken, in the setting for training, and in the number of participants that can be trained in one workshop. Groups may be composed in various ways depending on the specific application.

- ADAPTABILITY

Analyzing Problems treats comprehensive K-12 school and district problem situations. Aside from the variety of illustrations drawn from K-12 district and school settings, the problem analysis processes could be easily adapted to any instructional setting without regard to grade level, curriculum content, or organizational unit.

- COST RANGE

Coordinator Handbook, $ 4.95, available from Far West Laboratory, 1855 Folsom Street, San Francisco, California 94103.
Participant Manual, Analyzing Problems, $10.00.
California School Administrators (ACSA), 1575 Old Bayshore Highway, Burlingame, California 94010.

- REFERENCES: NIE Catalogue, page number 1156.

## DETERMINING INSTRUCTIONAL PURPOSES: UNIT 3 - DERIVING OBJECTIVES

(Third Unit in the Determining Instructional Purposes Training Package and One of Five Units in the Far West Laboratory for Educational Research and Development Educational Management Training Series.)

### ● INTENDED USERS:

Primary: Assistant superintendents, curriculum directors, principals, department heads, and lead teachers involved in long-range instructional planning and decision-making at grades K-12.
Secondary: Graduate students training for administrative credentials and positions.

### ● MAIN EMPHASES

Raising awareness and understanding of the importance of deriving objectives as part of the instructional goal refinement process; providing concepts and practical skills in translating goals into more specific statements of learning outcomes.

### ● INTENTS/CONTENTS

The training material is organized in separate modules consisting of reading assignments, input materials, worksheets, and written feedback.

Deriving Objectives is divided into four modules, each concerning a specific goal refinement skill. These are:
.The Goal Refinement Process
.Screening Objectives
.Analyzing Sets of Curricular Objectives
.District Planning for Goal Refinement.

### ● MAIN ACTIVITIES

The unit is designed so that participants function on their own, either individually or in groups, much of the time. A coordinator acts as an organizer, guide, and monitor. The training material in each unit is organized in separate modules consisting of reading assignments, input materials, worksheets, and written feedback. Immediate feedback is provided in self-test exercises by comparing the participant's responses with suggested responses. Since worksheets are supposed to reflect team consensus, the work done by each individual is not considered done until another team member has reviewed it. At the end of each module, teams exchange comments on the training activities and discuss problems they encountered. The developers suggest giving additional assignments individually, so that participants can use the process learned in real-life school situations of their own chosing and write a paper describing the process used.

### ● PROVISIONS FOR USE

A. Format: Workshop or course.
B. Personnel: A coordinator who acts as an organizer, guide, and monitor is essential if the training units are to achieve their intended results. The coordinator should be an administrator in a school or district, or a professor for a university-based course. Neither the participants nor the coordinator need be proficient in instructional planning and management, but they should be familiar with the operations of schools.
C. Product Components:
Required: Deriving Objectives. A loose-leaf student manual. Coordinator Handbook. Provides instructions for conducting the workshop, information on the development of the training unit, and detailed instructions about the activities of all three units in the Determining Instructional Purposes package.
D. Other Resources: The unit is self-contained. Note that this unit contains a separate programmed text, used in module three, "Analyzing Sets of Curricular Objectives."
E. Related Products: Deriving Objectives is one of three related units in the Determining Instructional Purposes training package. The other two units are: Setting Goals and Analyzing Problems. Two related products in the Far West Laboratory series are Designing Instructional Programs and Evaluation for Program Improvement. The RBS Handbook of Comprehensive Planning in Schools and CEPM Community-Based Broad Goal Definition are other related products.
F. Time Span: A minimum of 10 to 12 hours is required for the completion of the unit, with an estimated time of two to three hours per module. The total time varies with particular groups depending on their motivation, level

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of skills, and how thoroughly they want to cover the skills (see CONDITIONS OF USE below). Workshops can be either in small segments lasting from one to three hours or concentrated in a two- or three-day session. The Coordinator Handbook offers suggestions for alternate scheduling.

- CONDITIONS OF USE

Each unit is a self-contained training tool designed to incorporate into the course or workshop as many facets of an actual school setting as possible. Deriving Objectives encourages participants to approach exercises critically and to challenge the developers' suggested (feedback) responses. Goal refinement is presented as a series: (1) educational philosophy, (2) goals, (3) goal indicators, (4) curricular objectives, and (5) instructional objectives. However, the number of steps a district may chose to pursue will vary depending on the nature of each goal and the degree of specificity which is viewed as necessary by those involved. The time needed to complete this unit is determined by participants and coordinator and depends on how intensively they plan to study the materials. The materials have been deliberately designed to afford great flexibility in scheduling of time for each unit, in the sequence in which units are taken, in the setting for training, and in the number of participants that can be trained in one workshop. Groups may be composed in various ways depending on the specific application.

- ADAPTABILITY

Deriving Objectives treats comprehensive K-12 school district goal refinement. Aside from the variety of illustrations drawn from K-12 district and school settings, the processes of goal refinement could be easily adapted to any instructional setting without regard to grade level, curriculum content, or organizational unit.

- COST RANGE

Coordinator Handbook, $4.95, available from Far West Laboratory, 1855 Folsom Street, San Francisco, California 94103.
Participant Manual, Deriving Objectives, $10.00.
California School Administrators (ACSA), 1575 Old Bayshore Highway, Burlingame, California 94010.

- REFERENCES: NIE Catalogue, page number 1156.

# DESIGNING INSTRUCTIONAL PROGRAMS

(Fourth Unit of Five Units in the Far West Laboratory for Educational Research and Development Educational Management Training Series.)

## ● INTENDED USERS

Primary: Assistant superintendent, curriculum directors, principals, department heads, and lead teachers involved in long-range instructional planning and decision-making at grades K-12.
Secondary: Graduate students training for administrative credentials and positions.

## ● MAIN EMPHASES

Improving school staff understanding of factors associated with effective instructional program design; also designed as a procedural guide for use by school staff.

## ● INTENTS/CONTENTS

The unit is designed to help school staff develop instructional programs and/or select appropriate curricula based on a number of factors. These factors are presented in five modules. These are:

.Chalk Talk--a competitive game in which participants perform the tasks of program design.
.Analyzing Basic Assumptions--activities designed to help participants state basic assumptions about the teaching/learning process.
.Matching Programs With Goals--examining four types of learning goals, sorting and grouping goals, and matching goals with appropriate program design operations.
.Assessing Resources and Constraints--assessing the readiness of a school to implement new or revised programs.
.Selecting Curricula--using the "Curriculum Analyzer," a tool designed to help users rate alternative curricula in terms of feasibility.

## ● MAIN ACTIVITIES

The unit is designed so that participants function on their own or in groups. A coordinator acts as an organizer, guide, and monitor. The material is organized in separate modules consisting of reading material, exercises, techniques, procedures, and tools to help users perform the various tasks. Team feedback as well as written feedback is provided for the various tasks to permit participants to compare their responses with other participants' and with the author's suggested feedback. Self-tests are provided. Two of the modules are completed individually and may be done in or out of the group training setting.

## ● PROVISIONS FOR USE

A. Format: Workshop or course.
B. Personnel: A coordinator who acts as organizer, guide, and monitor is essential if the unit is to achieve its intended results. The coordinator may be any district or school staff member, college or university professor whose credibility as a leader is recognized. Neither the participants nor the coordinator need to be proficient in instructional planning and management, but they should be familiar with the operations of schools.
C. Product Components:
Required: Designing Instructional Programs. Five modules in two participant handbooks per student.
Coordinator Handbook. Provides step-by-step guidelines for administering the unit.
D. Other Resources: The unit is self-contained.
E. Related Products: Designing Instructional Programs is the fourth of five units in the Far West Laboratory Educational Management series. The others are: Setting Goals, Analyzing Problems, Deriving Objectives, and Evaluation for Program Improvement.
F. Time Span: Each module requires approximately three hours to complete, but the total time varies according to the size of the group and the setting. A total of 15-18 hours is estimated for the entire unit. Workshops may be scheduled in one intensive two- to three-day period or spaced over an extended period of time.

## ● CONDITIONS OF USE

The unit is a self-contained tool designed to incorporate as many realistic facets of actual school settings as possible. Flexibility in use of the unit is provided by its modular design. It is recommended that a single workshop or class be limited to 12 participants per coordinator. Familiarity with school operations is the primary prerequisite for participation.

- ADAPTABILITY

The unit is adaptable to a variety of conditions of use by both individuals and groups who are interested in program design issues. The processes used are easily adaptable to any instructional setting without regard to grade level, curriculum content, or organizational unit.

- COST RANGE

Coordinator Handbook, $3.95. Participant Handbooks (set of two), $8.95. Complete set of materials for 10 trainees includes educational game, 10 sets of two participant handbooks, pocket analyzer, coordinator handbook, $135.00. Available from Far West Laboratory for Educational Research and Development, 1855 Folsom Street, San Francisco, California 94103.

- REFERENCES: NIE Catalogue, page number 1091.

## EVALUATION FOR PROGRAM IMPROVEMENT

(Fifth Unit of Five Units in the Far West Laboratory for Educational Research and Development Educational Management Training Series.)

- INTENDED USERS

Primary: District level curriculum specialists, building level administrators, teachers, grades K-12.
Secondary: Graduate students in administration or evaluation courses.

- MAIN EMPHASES

Improved attitudes about the potential contribution of program evaluation to information useful in the improvement of instructional procedures. Increased understanding of factors involved in instructional process decision-making and related evaluation planning.

- INTENTS/CONTENTS

The unit consist of five sections involving planning for a simulated evaluation study. The sections are directed to the following topics:

.Identifying necessary and feasible decisions and specifying those responsible for the decisions;
.Identifying alternatives for the decision-makers;
.Determining information that will be relevant to the decision-maker;
.Planning for the collection and organization of the desired information;
.Using the information for program modification or revision.

An annotated bibliography in each section identifies additional publications and materials related to the appropriate topics, if a user wishes to pursue a given topic in more detail. An organized bibliography at the end of the unit lists additional relevant training materials and references that would be useful in planning an evaluation study.

- MAIN ACTIVITIES

.Limited amount of directed reading about the simulated evaluation study.
.Suggested additional reading prior to and following each section.
.Role-playing as member of an evaluation planning team.
.Group discussion of feedback from the actual study on which the simulated study was based, with material included for the discussion leader.

- PROVISIONS FOR USE

A. Format: Workshop or course.
B. Personnel: Coordinator responsible for guiding participants through the activities. Coordinator need not be a specialist in evaluation, but about 15 hours of advanced preparatory reading may be required in addition to time needed to make arrangements for the use of the unit.
C. Product Components: A Coordinator's Handbook and one Participant's Handbook for each participant. Film strip, audiotape cassette, and overhead projector transparencies are strongly recommended. The Coordinator's Handbook suggests alternatives if necessary audiovisual equipment is not available, however.
D. Other Resources: The unit is self-contained, but the coordinator is encouraged to assemble as many of the books included in the annotated bibliography as possible so they can be readily available to participants.
E. Related Products: Other units in the Far West Laboratory Educational Management series are: Setting Goals, Analyzing Problems, Deriving Objectives, and Designing Instructional Programs. Related products cited in the unit bibliography are: CSE Evaluation Workshops; CSE Test Evaluation publications; Worthen, Hoch, and Brzezinkski, Educational Evaluation Simulation; Popham and Baker, Evaluation; and Cincinnatti Public Schools, Evaluator Training Program.
F. Time Span: Unit can be covered in 12 hours of meeting time, but ideally should allow at least 15 hours. Coordinator's Handbook contains suggestions for material to be omitted if 15 hours are not available. Ideally, additional time should be allowed between sessions for outside reading of material in the Participant's Handbook and of other materials recommended, if the books are available.

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- CONDITIONS FOR USE

Unit designed for 6-11 participants working as a single group. With experience, a coordinator could manage two groups meeting concurrently in nearby rooms. Although the five sessions have been conducted in one weekend (evening and two days), it is clearly preferable to space the sessions over a longer period of time. The unit will be of only limited value to those interested primarily in summative evaluation planning.

- ADAPTABILITY

The unit has been used as a five-week segment of a semester course in educational evaluation. The principles and materials in the unit could probably be easily extended to treat summative evaluation issues more fully.

- COST RANGE

Coordinator's Handbook, transparencies, film strip, and audiotape, $34.95. Participant's Handbook, $7.95 per copy. Available from Far West Laboratory for Educational Research and Development, 1855 Folsom Street, San Francisco, California 94103.

- REFERENCES: NIE Catalogue, page number 997.

EDUCATIONAL INFORMATION CONSULTANT INSTRUCTIONAL SYSTEM

- INTENDED USERS

Primary: Linking agents, information center staff, librarians, educational research and development staff.
Secondary: Graduate students in schools of education and library science.

- MAIN EMPHASES

The primary objective of the instructional system is to develop the skills, knowledge, and attitudes required to function in an Education Information Consultant (EIC) role.

- INTENTS/CONTENTS

1. Main outcomes: Virtually all students completing the training package achieve "basic skills" levels of competence and the majority achieve "proficiency" or "high proficiency" in EIC competencies.
2. Main content areas: The training is based on a model which covers five major processes:
   .Negotiation: Identification, definition, and analysis of the problem and attendant information needs of a client.
   .Retrieval: Development of a search strategy to locate, identify, and secure R&D information pertinent to the client's problem and request.
   .Transformation: Screening, analysis, synthesis, and organization of results of the search into a format appropriate for delivery to the client.
   .Communication: Display and communication of the results to the client in a style appropriate for his/her use in finding a solution to the problem.
   .Evaluation: Assessing the pertinence of the major EIC processes, overall role, and operational effectiveness within the linkage system; reformulation based on evaluation and adjustments made in EIC processes and functions.

- MAIN ACTIVITIES

Knowledge, skills, and affective behaviors in each process are demonstrated in a sequential, modular configuration. The approach is to provide the trainee with a meaningful orientation to the whole EIC role, and with an opportunity to master tasks during training in the order they are performed on the job. Instructional activities in each module have three phases: (1) preparation, (2) learning, and (3) application. Student-centered learning exercises feature group and individual activities including role-playing, problem-solving, simulation, and decision-making exercises.

- PROVISIONS FOR USE

A. Format: To accommodate a variety of audiences in various environments, training was developed in three forms: course, institute, and learning team, which differ primarily in scheduling, formats, and procedures.

B. Personnel: An instructional manager, familiar with EIC materials and their use, is required for all formats.

C. Product Components: EIC Training Manual: a workbook containing readings, exercises, sample forms, and other job aids developed for use by trainees. This is a consumable item, normally to be purchased by each participant. EIC Guide to Instructional Management: a loose-leaf notebook containing schedules, training plan, instructional goals, background readings, detailed directions for handling each learning element, and evaluation guidelines material for the instructional manager. This guide is needed only for the course or institute forms.

D. Other Resources: The unit is self-contained, but the instructional manager can augment its content with additional readings or other materials.

E. Other Resources: The Far West Laboratory Educational Development Dissemination and Evaluation training modules 2.3, "The Retrieval of Information Using Bibliographic Sources;" 2.4, "The Retrieval of Information Using Special Sources;" and 3.1, "Oral Communication" may be used as supplementary materials.

F. Time Span: The training is organized in a series of instructional modules. The course form is designed to fit the fifteen-session pattern of a college semester schedule. The actual instruction time totals approximately 45 hours. The institute form requires ten six-hour days to complete and is suitable for summer school courses or on-the-job training. The learning team form is designed to be self-administered by a group of at least three trainees and monitored through correspondence with an instructional manager. The schedule for this form calls for ten team sessions (a team consists of three to six members) and approximately 30 hours of individual activities. Average time to complete this form is approximately ten weeks.

- CONDITIONS OF USE

Operational field testing indicates that both the course and the institute form work well and that the materials are sufficient to enable instructional managers with varying backgrounds and experience to effectively administer the training and achieve the student outcome standards. A generally low completion rate for the learning team form indicates that this form is not as successful, and probably should be undertaken only where there are strong incentives and a highly competent and accessible instructional manager.

- COST RANGE

An independent study credit course (X-364) is available for $65.00. Printed materials alone (Training Manual) cost $16.50, available from Independent Study, University of California at Berkeley, Berkeley, California 94720.

- REFERENCES: NIE Catalogue, page number 1200.

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# EDUCATIONAL DEVELOPMENT, DISSEMINATION, AND EVALUATION (DD&E) TRAINING RESOURCES

## • INTENDED USERS

Primary: Professionals employed in educational R&D agencies, or in development, dissemination, or evaluation positions within other educational agencies who need inservice or on-the-job training resources for themselves or for their subordinates; graduate students in preservice or inservice programs.

Secondary: Administrators, media specialists, curriculum consultants, linking agents, materials resource center staff, or other educators who may need an orientation to educational development, dissemination, or evaluation, or specific skills in these areas.

## • MAIN EMPHASES

An individualized, competency-based professional program with a flexible curriculum in educational product and program planning, development, dissemination, and evaluation.

## • INTENTS/CONTENTS

Main Goals: To provide users with knowledge, skills, and sensitivities specifically appropriate to effective performance at "entry-professional levels" in educational DD&E work settings.

Main content areas:

- .Series 1. Planning: An Overview; Problem Definition and Specification of Outcomes; Consideration of Alternatives; Introduction to Development; Introduction to Evaluation; Introduction to Dissemination and Marketing.
- .Series 2. Information/Data Collection, and Organization: Orientation to Collecting and Organizing Information and Data; Data Management; The Retrieval of Information Using Bibliographic Sources; The Retrieval of Information Using Special Sources.
- .Series 3. Communication Skills: Oral Communication; Written Instructional Materials; Technical Writing-Informal Documents; Technical Writing-Formal Documents.
- .Series 4. Development: Introduction to Development; Designing Educational Products; Product Engineering; Review, Tryout, and Revision; Special Problems in Development.
- .Series 5. Evaluation: Introduction to Evaluation; Measurement and Testing for Developers and Evaluators; Design of Evaluation Instruments; Planning and Implementing Evaluation; Evaluation Problems.
- .Series 6. Dissemination and Marketing: Introduction to Dissemination and Marketing; Marketing Educational Products.

## • MAIN ACTIVITIES

The DD&E training resources are primarily self-instructional. Each series consists of the set of modules listed above. Each module contains several Episodes, which contain the readings, examples, and basic instructional content of the module. Specific Episode Objectives, displayed at the beginning of each episode, state in performance terms the outcomes the student should achieve. Exercises are provided to give the student an opportunity to apply concepts and skills. Exercises are followed by model responses and explanations in the Feedback section. Review Questions are provided to check understanding of concepts, principles, and skills covered. A Summary after the last episode reviews key points and principles. Study Suggestions present new problems and questions and provide opportunity to apply, practice, and discuss the module content. References are provided for further study of specific topics. Finally, separately-bound End-of-Module-Tests permit assessment of mastery of the objectives for each module.

## • PROVISIONS FOR USE

A. Format: Primarily self-instructional; may be used as instructional resources in on-the-job, preservice, or inservice training programs or as components of graduate training programs.

B. Personnel: Self-instructional; but training is enhanced significantly if an instructional resource manager, familiar with the use of the DD&E materials, is available.

C. Product Components: Twenty-three Instructional Modules, organized in six major series, but usable separately or in a variety of other combinations than the six defined series. A User (User) Guide to Training Resources describes the purpose, structure, and objectives of each module. An Assessment System, which provides a manual and guide to the use of diagnostic, program planning, program progress assessment, and exit competence certification resources.

D. Other Resources: These are specific to each module and are listed in the modules.

E. Related Products: Because of the breadth of coverage of the DD&E modules, there are numerous related products, for example, the DD&E Evaluation Series is related to the FWL Evaluation for Program Improvement, to the RBS Evaluating A Curriculum Program, and to many of the CSE workshops and kits.

F. Time Span: Individual modules require 6 to 24 hours of student work to complete, exclusive of special exercises or projects; with the majority of modules averaging from 14 to 20 hours. The entire set of six series provides the "core" for a year-long, intensive M.A.-level program or its equivalent.

- CONDITIONS OF USE

The DD&E resource system was deliberately designed to fit a wide range of uses and is now employed in a variety of settings ranging from use in higher education programs (community colleges, B.A., M.A., and doctoral programs in the behavior sciences, educational technology, educational R&D, educational evaluation) to use in on-the-job training or upgrading in educational agencies.

Modules in the Planning, Information/Data Collection and Organization, Communication Skills, Evaluation, or Dissemination and Marketing series may be of special interest to educational linking or change agents.

Although self-instructional, access to an instructional resources manager (IRM), who can aid the student in diagnosing training needs, planning a personalized program of study, assessing progress, suggesting and reviewing specific applications projects, discussing problems and issues, etc., is highly recommended.

The IRM role can be played by a work supervisor or a college instructor.

- COST RANGE

Prices of individual modules vary. For complete list of prices write Attention Order Department, Far West Laboratory for Educational Research and Development, 1855 Folsom, San Francisco, California 94103.

- REFERENCES: NIE Catalogue, page number 994.

## RURAL FUTURES DEVELOPMENT (RFD) STRATEGY

### ● INTENDED USERS

Primary: Rural School-community groups, Rural school staff, Rural school administrators, Rural school boards, Regional educational service agency personnel, State educational agency personnel
Secondary: The Rural Futures Development Strategy may also be relevant to agencies and organizations interested in citizen participation in educational decision making and planning in urban and suburban areas.

### ● MAIN EMPHASES

1. Skill/competency training.
2. RFD is a comprehensive model for citizen involvement in educational planning and problem solving. As such, it includes training and supportive materials for focusing on needs, searching for alternative solutions, developing implementation and evaluation plans, and working effectively in groups and collaborating with others.

### ● INTENTS/CONTENTS

The main goal of the RFD Strategy is to strengthen the capacity of rural school districts to engage in systematic educational planning and problem solving. Consultation, training and materials are the means provided in the strategy to meet this goal.
The general outcome objectives of the RFD Strategy can be summarized as:

a. Improved communication about decision making will exist at the local level among school personnel, students, school board members, and community members.
b. Students, school staff and community members will perceive that they have greater influence upon decisions made by the school board and school staff.
c. Students, school staff, community members and the school board will have an increased sense of responsibility for and ownership of the local school.
d. Personnel in support agencies such as State Education Agencies and Regional Educational Service Agencies will have increased confidence in the ability of local people to make decisions which affect them, increased commitment to the use of procedures which promote local problem solving and decision making, and increased capability to support such activities.

### ● MAIN ACITIVIES

Citizen involvement in the RFD Strategy begins with the formation by the school board of a representative body of people from the school board and community. This School-Community Group:

1. focuses on the community's educational needs.
2. searches for ways to meet those needs.
3. selects alternatives that fit local conditions and resources.
4. presents a plan of action for school board approval.
5. assesses the results and begins a new cycle of activities.

The group is assisted with its tasks and activities by a team of "process facilitators," hired or selected in the region and skilled in helping local groups work effectively.

### ● PROVISIONS FOR USE

A. Format: On-site, do-look-learn model using both formal training sessions and guided field experiences.
B. Personnel: A team of two qualified trainers who train and consult with:
RFD Process Facilitator Team Trainers (state level)
RFD Process Facilitation Team (regional level)
C. Product Components:
Consultation: RFD Support Agency Guide.
Training: RFD Training Guide, RFD Sample Training Activities, RFD Process Facilitator Manual.
Materials for the Local Level: RFD Notebook for School-Community Groups, RFD Guide for Schools, RFD Guide for School Boards.
D. Other Resources: None
E. Related Products: Specific needs in skills development identified by either the trainers, the process facilitators or the individuals at the local level may be met through the use of materials such as Interpersonal Communication (IPC) or Research Utilizing Problem Solving (RUPS) developed by the Northwest Regional Educational Laboratory.
F. Time Span: There are approximately 14 formal training sessions consisting of 15-20 hours each and a number of

guided field experiences which vary in length according to field demands. Both occur over a 12-22 month period.

- CONDITIONS OF USE

The RFD Strategy is currently (through November 30, 1977) undergoing development, testing, and refinement. Consequently, the RFD materials and services are only available to agencies and groups who are participating with us in a field test of all or a portion of RFD.

- ADAPTABILITY

The material and strategy can be modified and used by urban and suburban audiences.

- COST RANGE

Potential users must consider cost for:
1. Qualified trainer team--salaries, per diem, travel, overhead
2. Release time for participants
3. RFD products

To obtain materials, contact:

Dr. Rowan Stutz, Improving Teaching Competencies Program, Northwest Regional Educational Laboratory, 710 S.W. Second Avenue, Portland, Oregon 97204.

- REFERENCES: NIE Catalogue, page number 1124-1142.

## SYSTEMATIC AND OBJECTIVE ANALYSIS OF INSTRUCTION (SOAI)

### • INTENDED USERS

SOAI has been designed for the following role groups: teachers, administrators, supervisory and coordinating personnel, and preservice education students.

### • MAIN EMPHASES

This instructional system, based on the Cogan Supervisory Cycle, presents a structured program for improving classroom teaching. It provides information for supervisors so they can help teachers objectively study, analyze and improve classroom performance. Participants who complete the training learn skills in interpersonal relations, supervisory techniques, and teaching strategies that can be applied in self-analysis as well as the analysis of others' teaching behavior.

### • INTENTS/CONTENTS

SOAI is designed to enable each trainee to:

1. Demonstrate provisionally different behaviors as a means to internalizing learning.
2. Demonstrate interpersonal communication skills such as paraphrasing, perception checks, behavior descriptions, describing feelings and freeing responses.
3. Demonstrate increased interdependence in a group by applying the principles of effective group process.
4. Demonstrate skill in establishing interpersonal relationships with others by applying the principles for building trust.
5. Plan instructional objectives with a teacher which include observable pupil behavior, conditions for learning and criteria of acceptable performance.
6. Observe a teaching performance and record in verbatim transcript most of the verbal and nonverbal behavior.
7. Analyze the transcript from the observation for patterns of teaching and learning behavior.
8. Plan strategy for a conference based on analysis of the transcript.
9. Conduct a conference which enables the teacher to gain insight into his or her teaching and possible alternative behaviors.
10. Interpret one's own and others' performance critically in relation to the objectives of this program.

### • MAIN ACTIVITIES

There are 47 steps in an SOAI workshop. These include such activities as seminar and practicum. The orientation is toward achieving group unity and increasing higher levels of group planning and decision making, with diminishing dependence on the trainer. Each lecture through Step 17 involves all trainees, meeting in a large group situation. The remaining seminar sessions can be conducted by individual trainers with practicum groups. Each practicum group is composed of up to ten trainees and a trainer. Each operates independently of the other practicum groups in the workshop. Therefore, it is not to be expected that each of the practicum groups will necessarily engage in the same activities simultaneously or be in the same stages of development.
In developing new skills, trainees: (a) plan daily lessons together, (b) observe teachers using the plans with pupils, (c) learn to record systematically what happens in the classroom, (d) analyze objectively the information for patterns of teaching behavior, and (e) use the information to plan ways of improving instruction.

### • PROVISIONS FOR USE

A. Format: Workshop or Campus Class.
B. Personnel: A qualified and experienced trainer per 10 participants.
C. Product Components:
Required: 1 trainer's manual per trainer, 1 set of participant materials per participant.
Optional: Systematic and Objective Analysis of Instruction, Technical Report No. 9 (1972).
D. Other Resources: For each group of 12 participants, two classrooms with teachers and students are required for observation/practicum as well as one additional room for seminars.
E. Related Products: NWREL 3,4,5,6,7,8,9.
F. Time Span: The 47 instructional sequences of this system are organized into a workshop or campus class requiring 100 hours of training.

## CONDITIONS OF USE

These materials are sequentially organized to achieve a cumulative attainment of the stated objectives. The training design includes a great deal of participant interaction for feedback, simulation trials and interdependent action. For this reason, all participants are required to commit themselves to full attendance at all workshop sessions.

## ADAPTABILITY

These materials can be used in either a sequential workshop or a campus class.
Product Availability:
Training Materials: Commerical-Educational Distributing Services (CEDS), P. O. Box 3711, Portland, Oregon 97208.
Evaluation Reports: John Lohman, Program Director, Improving Teaching Competencies, Program, Northwest Regional Educational Laboratory, 710 S.W. Second Avenue, Portland, Oregon 97204

## COST RANGE

Training Manual: Systematic and Objective Analysis of Instruction (248 pages, bound) $12.65
Participant Materials (151 pages, loose leaf and three-hold punched) $8.50 per set.
By James Hale and Allan Spanjer
Optional evaluation report is available for $5.00.
Client groups must consider:

1. Cost for trainers, including travel expenses and per diem
2. Release time for participants

To Obtain Materials, Contact:

Commercial Educational Distribution Services
P. O. Box 3711, Portland, Oregon 97208

- REFERENCES: NIE Catalogue, page numbers 1124-1142.

# SOCIAL CONFLICT AND NEGOTIATIVE PROBLEM SOLVING

## INTENDED USERS

Social conflict and Negotiative Problem Solving is designed primarily for the following role groups: teachers, administrators, supervisory and coordinating personnel, and persons from teacher associations, colleges, universities, state departments and community education groups.

## MAIN EMPHASES

Social Conflict and Negotiative Problem Solving is a relatively structured, experience-based workshop which focuses on helping people to develop more useful personal understandings of conflict and to respond more successfully to conflict situations.

## INTENTS/CONTENTS

The workshop is based on the assumption that experience precedes learning and that the meaning gained from any experience comes from the learner. Participants have an opportunity to interact with designed activities and theory papers to form personal understandings and attitudes about the following key aspects of conflict:

The nature of conflict
What is conflict, The cause of conflict, Feelings and conflict, Diagnosing conflict

Self-interest and conflict
The role of self-interest in conflict, Distinguishing among self-interest, selfishness and altrusim, Identifying your own and others' self-interests, Presenting self-interests: assertive, nonassertive and aggressive styles

Power and conflict
The role of power in conflict, The bases of power, Feelings of power and impotence, Diagnosing power

Responding to conflict
Interpersonal styles for coping with conflict: avoidance, accommodation, competition, collaboration and negotiation

A Negative Problem Solving (NPS) process for conflict
Conditions for NPS, Diagnosing conflict, Preparation for negotiation, Good faith bargaining, Assessing negotiation outcomes

## MAIN ACTIVITIES

Through designed activities and simulations, participants are presented with multiple opportunities to involve themselves in learning about conflict at personal and interpersonal levels. Participants are encouraged to establish and pursue their own learning goals and to support norms of openness to self-inquiry, risk taking and experimenting with new behavior. Opportunity is provided for personal reflection and integration, and for application to participant work settings.

## PROVISIONS FOR USE

A. Format: Workshop.

B. Personnel: A team of two qualified and experienced trainers per 20-36 participants.

C. Product Components:
Required: 1 trainer's manual per trainer, 1 set of participant materials per participant.
Optional: Evaluation Report(s):
Planning Milestone Report for Social Conflict and Negotiative Problem Solving (1974).
Pilot Milestone Report for Social Conflict and Negotiative Problem Solving (1975).
Interim Milestone Cycle 1 Evaluation Progress Report (1976).

D. Other Resources: Newsprint, felt pens, masking tape, A large room (preferably carpeted) with movable tables and comfortable chairs, Beverages and refreshments in the room.

E. Related Products: This program is related to Research Utilizing Problem Solving, Interpersonal Communications, Interpersonal Influence, Preparing Educational Training Consultants I, II and III.

F. Time Span: The workshop includes five days of training which can be covered consecutively or on consecutive weekends.

## CONDITIONS OF USE

This training may be more effective if participants have previous workshop experience in small group process skills. Participants must be present for every session of the workshop since the exercises are sequential and cumulative; interdependence among participants in these exercises is high.

- ADAPTABILITY

Information is not available at this time. Product Availability: The materials for this program are currently undergoing development and evaluation. For this reason, the training materials are available for approved field test purposes only. Optional evaluation reports are available at $5.00 each from the Northwest Regional Educational Laboratory, Improving Teaching Competencies Program, Dr. John Lohman, Program Director.

- COST RANGE

Materials are currently under development and training is provided at no cost to participants when used for field test purposes.

To Obtain Materials, Contact:

Dr. William T. Ward, Improving Teaching Competencies Program, Northwest Regional Educational Laboratory, 710 S.W. Second Avenue, Portland, Oregon 97204.

- REFERENCES: NIE Catalogue, page number 1147.

# RESEARCH UTILIZING PROBLEM SOLVING (RUPS)

## • INTENDED USERS

Primarily, RUPS has been designed for the following role groups: teachers, administrators, supervisory and coordinating personnel, and students in preservice education. The instructional system can also be used with high school students, parents, and community groups.

## • MAIN EMPHASES

Research Utilizing Problem Solving is an experiential instructional system which provides information about a 5-step method of problem solving and gives participants an opportunity to practice and improve their problem solving skills. Team building relationships are emphasized in the workshops. Participants develop a project to be implemented in their backhome setting.

## • INTENTS/CONTENTS

The purpose of a RUPS workshop is to prepare educators to use techniques for defining, analyzing and solving problems. The program provides teachers and administrators with competencies in:

- Applying four guideline criteria for writing a problem statement.
- Paraphrasing in interpersonal communications.
- Using the force field diagnostic technique.
- Selecting and creating instruments for data gathering.
- Diagnosing teamwork relationships.
- Spotting and analyzing major results in data collected.
- Identifying personal styles of teamwork behaviors.
- Utilizing concepts and skills of giving and receiving feedback.
- Using criteria for deriving implications from research findings.
- Brainstorming action alternatives to meet implications derived from findings.
- Applying guidelines for planning and implementing action alternatives.
- Identifying and evaluating small group dynamics.
- Planning a backhome project.
- Evaluating solution plans.
- Conducting a backhome RUPS project.

The program also gives participants skills and techniques for identifying and diagnosing classroom or school problems as well as for designing action plans to resolve them. Evaluation becomes a pattern of repeated objective diagnosis in this process. Emphasis of the entire design is on teachers and administrators practicing their "do it" skills to perform the problem solving process.

## • MAIN ACTIVITIES

A RUPS workshop is divided into sequential instructional sessions. In each session, participants engage in small group discussion, experiential exercises, and simulations. The system includes films, theory papers, written exercises, observation activities and self-evaluative guides. Continuous active participation is demanded by using a simulation situation in which the trainee "helps" a fictitious teacher or principal solve a problem using the RUPS model.

## • PROVISIONS FOR USE

A. Format: Workshop

B. Personnel: One experienced trainer per 12-36 participants.

C. Product Components:
Required: 1 trainer's manual per trainer, 1 set of participant materials per participant, 1 audiotape, 1 text per participant.
Optional: Research Utilizing Problem Solving: Outcome Evaluation Report (1976)
Research Utilizing Problem Solving: Summary of Outcome Evaluation Report (1976)
Outcome Milestone Report for Research Utilizing Problem Solving (1974)

D. Other Resources: 1 tape recorder, newsprint, felt pens, masking tape, a large room (preferably carpeted) with movable tables and comfortable chairs, beverages and refreshments in the room.

E. Related Products: This program is related to Social Conflict and Negotiative Problem Solving, Interpersonal Communications, Interpersonal Influence, Preparing Educational Training Consultants I, II and III.

F. Time Span: The 30 hours of instruction take five consecutive days or two sessions of 2½ days scheduled a week apart. Two 3-hour follow-up sessions are scheduled for six and twelve weeks

- CONDITIONS OF USE

Although there are no prerequisites for this training, participants must be present for every session of the workshop since the exercises are sequential and cumulative.

- ADAPTABILITY

The printed materials are easily adapted by qualified trainers to meet the needs of users other than educational personnel.

Product Availability:
Training Materials: Commericial-Educational Distributing Services, P. O. Box 3711, Portland, Oregon 97208
Evaluation Reports: Northwest Regional Educational Laboratory, Improving Teaching Competencies Program, Dr. John Lohman, Program Director

- COST RANGE

Classroom Version
Leader's Guide: Research Utilizing Problem Solving (282 pages, loose leaf and three-hole punched) $11.00
Participant Materials (281 pages, loose leaf and three-hole punched) $8.00 per set
By Charles Jung, Ruth Emory and Rene Pino
Audiotape Recording, $3.85
Text: Fox, R., M. B. Luszki and R. Schmuck. Diagnosing Classroom Learning Environments. Chicago: Science Research Associates, 1966. ($4.00)
Administrative Version
Leader's Guide: Research Utilizing Problem Solving (287 pages, loose leaf and three-hole punched), $11.10
Participant Materials (287 pages, loose leaf and three-hole punched) $7.90 per set
Audiotape Recording, $3.80
Text: Fox, R., R. Schmuck, E. Van Egmond, M. Ritvo and C. Jung. Diagnosing Professional Climate of Schools. Fairfax, Virginia: NTL Learning Resources Corp,. 1973. ($7.75)
Optional evaluation reports are available for $5.00 each.
Client groups must consider:
1. Cost for trainers, 5 days plus travel expenses and per diem
2. Release time for participants, 5 days

- REFERENCES: NIE Catalogue, page number 1143.

## INTERPERSONAL COMMUNICATIONS (IPC)

### • INTENDED USERS

Primarily, Interpersonal Communications has been designed for the following role groups: teachers, administrators, supervisory and coordinating personnel, and preservice education students. The instructional system can also be used with high school students and parent groups.

### • MAIN EMPHASES

Interpersonal Communications is an experiential instructional system. It provides (a) information about the process of communication, (b) opportunities for participants to increase their interpersonal communication skills and (c) experiences for understanding one's own styles of communication.

### • INTENTS/CONTENTS

An Interpersonal Communications workshop provides participants with knowledge and skills generally applicable to:

1. Face-to-face communication
2. Individual styles of communicating
3. Group and organizational factors which affect communication
4. Continued improvement of one's communication skills

During the workshop, exercises include: (a) paraphrasing, (b) behavior description, (c) describing feelings, (d) nonverbal communication, (e) the concept of feedback, (f) matching behavior with intentions, (g) communicating under pressure and (h) communication patterns in the school building.

### • MAIN ACTIVITIES

There are 20 instructional sessions that comprise an IPC workshop. Each session involves the participants in practicing communication behaviors, learning ways to recognize these behaviors, and receiving feedback concerning their use. The system includes films, theory papers, written exercises, observation activities, and self-evaluative guides.

### • PROVISIONS FOR USE

A. Format: Workshop

B. Personnel: One experienced trainer or a team of qualified trainers for 12-36 participants (materials provided for multiples of 6).

C. Product Components:
Required: 1 trainer's manual per trainer, 1 set of participant materials per participant, 9 16 mm films, 1 audiotape.
Optional: Field Test and Outcome Milestone Report for Interpersonal Communications (1974)
Summary of Interpersonal Communications Field Test and Outcome Milestone Report (1975)

D. Other Resources: 1 film projector, 1 tape recorder, newsprint, felt pens, masking tape, a large room (preferably carpeted) with movable tables and comfortable chairs, beverages and refreshments in the room.

E. Related Products: This program is related to Social Conflict and Negotiative Problem Solving, Research Utilizing Problem Solving, Interpersonal Influence, Preparing Educational Training Consultants I, II and III.

F. Time Span: There are 20 sessions which require approximately 30 hours to complete. Whenever possible training should be covered in five consecutive days or two sessions of 2½ days held within two weeks.

### • CONDITIONS OF USE

Although there are no prerequisites, participants must be present for every session of the workshop since the exercises are sequential and cumulative.

### • ADAPTABILITY

Easily adapted by qualified trainers to meet the needs of users other than educational personnel and to fit into differing time constraints.

Product Availability:
Training Materials: Xicom, Inc., RFD 1, Sterling Forest, Tuxedo, New York 10987
Evaluation Reports: Northwest Regional Educational Laboratory, Improving Teaching Competencies Program, Dr. John Lohman, Program Director

- COST RANGE

Leader's Manual: Interpersonal Communications (396 pages, loose leaf and three-hole punched) $19.95 each.
Participant Materials (342 pages, loose leaf and three-hole punched) $12.95 per set
By Charles Jung, Rosalie Howard, Ruth Emory and Rene Pino.

Audiovisual Instructional Materials
$195.00 per set of nine 16 mm sound films and one audiotape.
Above prices plus shipping charges.
Optional evaluation reports are available for $5.00 each.
Client groups must consider:
1. Cost for trainers, 5 days.
2. Release time for participants, 5 days.

To Obtain Materials, Contact:

Xicom, Inc., RFD #1, Sterling Forest,
Tuxedo, New York 10987. (914) 351-4735

- REFERENCES: NIE Catalogue, page number 1098.

## INTERPERSONAL INFLUENCE (INF)

### • INTENDED USERS

Primarily, Interpersonal Influence has been designed for the following role groups: teachers, administrators, supervisory and coordinating personnel, and preservice education students. The instructional system can also be used with high school students and parent groups.

### • MAIN EMPHASES

Interpersonal Influence is an experiential system which provides (a) information about the basic concepts of influence processes, (b) opportunities for participants to practice influence skills and to identify their characteristic styles of interpersonal influence.

### • INTENTS/CONTENTS

The activities in this instructional system are designed to provide the following competencies:

.Ability to identify and explain the major ideas that describe the processes of interpersonal influence.
.Capability for using guidelines provided to diagnose and analyze forces and effects of influence in selected interpersonal and group situations.
.Ability to identify and make judgements about one's characteristic influence styles.
.Capability for identifying ways in which principles learned and guidelines utilized in the workshop may be applied in settings other than the workshop.

### • MAIN ACTIVITIES

There are 20 instructional sessions in an Interpersonal Influence workshop. During the workshop, participants experience a variety of ways in which they may learn about interpersonal influence. There are written definitions, descriptions, some films and tape recordings to illustrate behaviors of present dilemmas. There are times for reflecting on experiences and ways of doing things; times for discussing ideas; techniques for observing and analyzing behavior. There are opportunities to share observations with others and to ask for observations and reactions. There are some simulation, task performance and role playing situations in which participants can try out behaviors.

### • PROVISIONS FOR USE

A. Format: Workshop
B. Personnel: One experienced trainer per 12-36 participants.
C. Product Components:
  Required: 1 trainer's manual per trainer, 1 set of participant materials per participant, 9 16 mm films, 1 audiotape.
  Optional: Follow-up Survey of Interpersonal Influence Interim Field Test Participants (1974)
  International Influence Interim Evaluation Report (1974)
  Summary of Interpersonal Influence Interim Field Test and Follow-up Survey (1975)
  Interpersonal Influence Final Evaluation Report (1976)
  Summary Report of Interpersonal Influence Field Test, Impact Study and Expert Review (1976)
D. Other Resources: 1 film projector, 1 tape recorder, newsprint, felt pens, masking tape, a large room (preferably carpeted) with movable tables and comfortable chairs, beverages and refreshments in the room.
E. Related Products: This program is related to Social Conflict and Negotiative Problem Solving, Research Utilizing Problem Solving, Interpersonal Communications, Preparing Educational Training Consultants I, II and III.
F. Time Span: The 20 sessions require 30 hours to complete. Whenever possible training should be covered in five consecutive days or two sessions of 2½ days held within two weeks.

### • CONDITIONS OF USE

Although there are no prerequisites for this training, participants must be present for every session of the workshop since the exercises are sequential and cummulative.

### • ADAPTABILITY

The printed materials are easily adapted by qualified trainers to meet the needs of users other than educational personnel and to fit into differing time arrangements.

Product Availability:

Training Materials: Xicom, Inc., RFD 1, Sterling Forest, Tuxedo, New York 10987.

Evaluation Reports: Northwest Regional Educational Laboratory, Improving Teaching Competencies Program, Dr. John Lohman, Program Director.

- COST RANGE

Leader's Manual: Interpersonal Influence (237 pages, loose leaf and three-hole punched) $19.50 each.

Participant Materials (185 pages, loose leaf and three-hole punched ) $12.95 per set, By Ruth Emory and Rene Pino.

Audio visual Instructional Materials $99.50 per set of four 16 mm sound films and two audiotapes.

Above prices plus shipping charges.

Optional evaluation reports are availalble

To Obtain Materials Contact:

Xicom, Inc., RFD #1, Sterling Forest,
Tuxedo, New York 10987. (914) 351-4735

- REFERENCES: NIE Catalogue, page number 1101.

## GROUP PROCESS SKILLS (GPS) -- A SKILLS TRAINING WORKSHOP

### INTENDED USERS

GPS has been designed for the following role groups: teachers, administrators, supervisory and coordinating personnel, and students in teacher preparation.

### MAIN EMPHASES

The materials used in a Group Process Skills (GPS) workshop have been designed to help participants become more effective members of the organizations to which they belong. The materials emphasize such process skills as communication techniques, problem solving, decision making and goal identification.

### INTENTS/CONTENTS

The Group Process Skills (GPS) program has been developed to provide participants with the opportunities to:

- Assess existing and potential problems within an organizational subgroup of which they are a part.
- Identify small group process skills which they, as an individual, need to improve.
- Increase their experience with these skills by participation in exercises chosen by the trainers.
- Integrate learnings for application in their backhome setting.

### MAIN ACTIVITIES

As a group works through the materials under the guidance of the trainer, data is gathered on the group's makeup and use of process skills. Participants gather much of this data themselves and learn to analyze it. Meanwhile, the trainers use the data to help them diagnose skill needs as well as to select and sequence exercises especially designed to speak to such needs.

### PROVISIONS FOR USE

A. Format: Workshop

B. Personnel:
Required: Two experienced trainers per 12-36 participants.

C. Product Components:
Required: 1 set of instructional strategies for GPS per trainer, 1 set of collection of exercises per trainer, 1 set of participant materials per GPS participant, multiple copies of exercises per workshop.

D. Other Resources: Newsprint, felt pens, masking tape, name tags; a large room (preferably carpeted) with movable tables and comfortable chairs; beverages and refreshments in the room.

E. Related Products: GPS is used as the practicum for Preparing Educational Training Consultants I (PETC-I), a training system designed to prepare individuals to function as "skills trainers."

F. Time Span: GPS requires approximately 33 hours of training. Whenever possible, training should be covered in five consecutive days.

### CONDITIONS OF USE

Although there are no prerequisites for this training, participants must be present for every session of the workshop since the exercises are sequential and cumulative.

### ADAPTABILITY

This training system is easily adaptable by qualified trainers to meet the needs of users other than educational personnel and to fit into differing time constraints. Product Availability: Commercial-Educational Distributing Services (CEDS), P. O. Box 3711, Portland, Oregon 97208.

### COST RANGE

Collection of Exercises, $31.00; GPS Instructional Strategies, $6.80; GPS Participant Materials, $5.90; duplicating options for multiple copies of exercise handouts (1 set of 133 camera-ready exercise handouts, $11.00; 12 sets of all exercise handouts, $64.00; 12 copies of a single exercise handout, $.50). Client groups must consider: cost for trainers, five days plus travel expenses and per diem; release time for participants, five days.

### REFERENCES: NIE Catalogue, page number 1101.

## PREPARING EDUCATIONAL TRAINING CONSULTANTS (PETC)

(A Series of Three Instructional Systems: PETC-I: Skills Training; PETC-II: Consulting; PETC-III: Organizational Development.)

### ● INTENDED USERS

PETC-I: Skills Training is designed for educators wishing to acquire trainer and consulting skills. PETC-II: Consulting is for educational personnel with a high degree of expertise in process training who wishes to acquire small group consulting skills. PETC-III is for educational personnel with a high degree of consulting skill who wishes to acquire organizational development training and consulting skills.

### ● MAIN EMPHASES

These three instructional systems provide knowledge and skills for educators to master processes that facilitate teaching by improving the group and organizational functioning of schools.

### ● INTENTS/CONTENTS

PETC-I: Skills Training provides training in diagnosing client needs and using "skills training exercises" to help a client group meet such needs as goal clarification, communication improvement and improving decision making procedures.

PETC-II: Consulting trains participants in diagnostic and intervention techniques to help a client temporarily add or strengthen a function needed to achieve a goal it desires.

PETC-III: Organizational Development (OD) prepares participants to help a client organization acieve structural and normative changes so as to build in and maintain improved functional capabilities when desired and feasible.

### ● MAIN ACTIVITIES

PETC-I is a two part workshop. The first part is a training program during wich the participants study the basic concepts of the system and practice group skills training. The second week is a practicum during which PETC-I participants lead another workshop on Group Process Skills (GPS).

PETC-II trainees receive instruction in the basic concepts of consulting. The second part of this system is a practicum in which trainees engage in consulting projects with prearranged client systems. The third part of the training is a debriefing session which involves evaluating the consultive practicum as well as integrating learnings of the workshop.

PETC-III meets periodically over an eight month period. The training includes a one-day preworkshop assignment, 17 days of workshop meetings, and at least 10 days conducting an organizational development project with a predetermined client group. The project is a series of interventions based on data collected and analyzed which aims at structural and normative changes to improve the functioning of the organization.

### ● PROVISIONS FOR USE

A. Format: Workshop
B. Personnel: See individual listings
C. Product Components: See individual listings
D. Other Resources: Newsprint, felt pens, masking tape; a large room (preferably carpeted) with movable tables and comfortable chairs; beverages and refreshments in the room
E. Related Products: NWREL 2,3,4,5,6,7,9.
F. Time Span: PETC-I: Part I, 5-day training program; Part II, 5-day practicum in leading GPS. PETC-II: Meets periodically over 8 months, total of 9 days. PETC-III: 1 day for preworkshop assignment, 17 days for workshop meetings, 10 days (minimum) for OD project

### ● CONDITIONS OF USE

Prerequisites:
.Preparing Educational Training Consultants I: Research Utilizing Problem Solving, Interpersonal Communications or comparable experience
.Preparing Educational Training Consultants II: Preparing Educational Training Consultants I, Research Utilizing Problem Solving, Interpersonal Communications, Interpersonal Influence or comparable experience

.Preparing Educational Training Consultants III: Preparing Educational Training Consultants I, Preparing Educational Training Consultants II, Research Utilizing Problem Solving, Interpersonal Communications, Social Conflict and Negotiative Problem Solving or comparable experience. Participants must be present for every session of the workshop since the exercises are sequential and cumulative.

- ADAPTABILITY

Product Availability:
Training Materials: PETC-I and PETC-II: Commercial Educational Distributing Services, P. O. Box 3711, Portland, Oregon 97208.
PETC-III will be available in the fall of 1976.
Evaluation Reports: Northwest Regional Educational Laboratory, Improving Teaching Competencies Program, Dr. John Lohman, Program Director.

- COST RANGE

See individual listing.

To Obtain Materials, Contact:

Commercial Educational Distribution Services
P. O. Box 3711, Portland, Oregon 97208.
(503) 236-0663.

- REFERENCES: NIE Catalogue, page numbers 1110-1118.

## PREPARING EDUCATIONAL TRAINING CONSULTANTS: SKILLS TRAINING (PETC-I)

(First of the Three-part PETC Series.)

### ● INTENDED USERS

This training system is designed for educators at any level who wish to acquire trainer and consultant skills.

### ● MAIN EMPHASES

PETC-I is an experiential instructional system which provides training in such process skills as goal setting, problem solving, communicating, influencing and decision making. The focus of a PETC-I workshop is to prepare participants to function as skills trainers and to conduct group process skills (GPS) workshops.

### ● INTENTS/CONTENTS

The general goal of PETC-I is to teach participants to train others in process skills and to facilitate the functioning of small groups. During this process, skills trainers are prepared to:

1. Assess issues and problems within a small group
2. Diagnose skill needs of individuals within the group
3. Identify group priorities for skills training exercises
4. Apply criteria for selecting and sequencing skills training exercises
5. Adapt and conduct skills training exercises
6. Evaluate acquisition of skills

### ● MAIN ACTIVITIES

The PETC-I system is a two part workshop. The first part of the program consists of a one week training program during which the PETC-I trainees (skills trainers) study the basic concepts of the instructional system. Also during the first week, the skills trainers are provided with a series of exercises to practice group skills training.

The second part of the workshop is a practicum for the skills trainers. During the practicum the skills trainers form trios; each trio works with a second group of 12 to 24 people. This second training week is referred to as the Group Process Skills (GPS) workshop, and the second set of participants are called GPS trainees. These sessions, which are conducted over a 5-day period, are designed so GPS trainees can obtain training in group process skills from the trio of skills trainers. The techniques and strategies of group process exercises are applicable to any group for whom the materials are new.

### ● PROVISIONS FOR USE

A. Format: Two-Part Workshop. Part I prepares skills trainers to conduct group process skills exercises. Part II (GPS workshop) allows skills trainers to practice while they conduct a workshop for others in group process skills

B. Personnel: One senior trainer who has completed prerequisites including Interpersonal Communications and Research Utilizing Problem Solving or has had comparable training experience
Parts II and III: Twelve to eighteen skills trainers, materials have been prepared for multiples of three
Part II; Twelve to twenty-four GPS participants per trio of skills trainers

C. Product Components:
Required: Part I: Skills Training
1 set of instructional strategies per senior trainer, 1 set of participant materials per skills trainer, 1 set of collection exercises per senior and skills trainer; Multiple copies of exercises per workshop
Part II: Group Process Skills Practicum
1 set of instructional strategies for GPS per skills trainer, 1 set of participant materials per GPS participant; Multiple copies of exercises per workshop
Optional: Field Test Technical Report for Preparing Educational Training Consultants: Skills training (PETC-I) (1975)
Outcome Evaluation Report for Preparing Educational Training Consultants: Skills Training (PETC-I)

D. Other Resources: Part I: Spacious room with movable and comfortable furniture; chairs and tables for small groups; Part II: A similar room for each team of skills trainers as well as a general meeting room for conferences and access to exercise materials; Facilities for both sessions should be located near refreshment facilities. Both sessions: Newsprint, felt pens, masking tape, name tags, art supplies.

E. Related Products: This program is related to Social Conflict and Negotiative Problem Solving, Research Utilizing Problem Solving, Interpersonal Communications, Interpersonal Influence, PETC-II and PETC-III.

F. Time Span: Two weeks are required for skills trainers, five consecutive days for Part I and either five consecutive days or two 2½ day sessions for Part II. Part II, the GPS workshop, requires one week of GPS participant time.

- CONDITIONS OF USE

Prerequisites for PETC-I skills trainers include Interpersonal Communications and Research Utilizing Problem Solving or comparable experience. There are no prerequisites for GPS participants.
Because this training is cumulative, participants must be present for every session of the workshop.

- ADAPTABILITY

Product Availability:
Training Materials: Commercial Educational Distributing Services, P. O. Box 3711, Portland, Oregon 97208.
Evaluation Reports: Northwest Regional Educational Laboratory, Improving Teaching Competencies Program, Dr. John Lohman, Program Director.

- COST RANGE

Part I: Skills Training
1 set of instructional strategies per senior trainer ($8.90), 1 set of collection of exercises per senior and skills trainer ($31.00), 1 set of participant materials per skills trainer ($6.85); Multiple copies of exercise handouts.
Part II: Group Process Skills (GPS) Practicum.
1 set of GPS instructional strategies per skills trainer ($6.80), 1 set of GPS participant materials per GPS participant. ($5.90), Duplicating options for multiple copies of exercise handouts.
1 set of 138 camera-ready exercise handouts ($11.00), 12 sets of all exercise handouts ($64.00), 12 copies of a single exercise handout ($.50).
Optional evaluation reports are available for $5.00.

- REFERENCES: NIE Catalogue, page number 1110.

## PREPARING EDUCATIONAL TRAINING CONSULTANTS: CONSULTING (PETC-II)

(Second in the Three-part PETC Series.)

- INTENDED USERS

This instructional system was designed for educational personnel with a high degree of expertise in process training who wish to acquire small group consulting skills.

- MAIN EMPHASES

PETC-II uses diagnostic and intervention techniques to focus on consulting in a temporary relationship with a client system. The PETC-II graduate should be capable of forming a temporary relationship with a small group or major subsystem of an educational organization. The temporary relationship is aimed at helping the client make progress toward their goals. It also should help the graduate use skills to improve that part of the organization over which he or she has managerial responsibilities. The PETC-II graduate learns to diagnose the organization's problems and to provide assistance that will temporarily add or strengthen such functions as managing, planning and producing. This system trains participants to help a group more adequately accomplish its immediate goals.

- INTENTS/CONTENTS

The main purpose of a PETC-II workshop is to prepare an educational training consultant to:

.Apply diagnostic techniques and intervention strategies to temporarily help a client system add, or strengthen, a function to realize a value or attain a goal.
.Diagnose his/her own competencies and derive an explicit retionale for assuming the consultant role.
.Apply phases of planned change in working with a client system.
.Apply a three-dimensional diagnostic matrix to identifying client needs.
.Apply a three-dimensional intervention matrix to working with the client system to meet a need.
.Identify his/her own competencies as related to the cells of the two matrices.
.Identify his/her own professional growth needs and goals.
.Identify his/her own value and ideological base for assuming the consultant role.

- MAIN ACTIVITIES

A PETC-II workshop is divided into three parts, the first consisting of three consecutive ten-hour days of instruction in basic concepts of consulting. Trainees are introduced to a variety of conceptual models and schema related to planned change. These include models developed by Lewin (1951) and Lippitt (1958) as well as comprehensive diagnostic and intervention models developed especially for this instructional system. The second part is a three-day practicum in which trainees engage in a consulting practicum with client systems prearranged by the workshop sponsor. The third part concludes the training with three days of debriefing, evaluating the consulting practicum and integrating learnings of the workshop.

- PROVISIONS FOR USE

A. Format: Three-Part Workshop. Part I gives instruction in basic concepts of consulting; Part II provides a three-day practicum with client; Part III includes debriefing, evaluating the practicum, and integrating learnings of the workshop.
B. Personnel:
Required: Two qualified trainers can train 10-15 participants.
C. Product Components:
Required: 1 set of instructional strategies per trainer, 1 set of participant materials per participant.
Optional: Evaluation Report(s): Interim Evaluation Report for Preparing Educational Training Consultants: Consulting (PETC-II) (1976); Field Test and Outcome Milestone Report Preparing Educational Training Consultants: Consulting (PETC-II) (1976); Summary of Field Test and Outcome Milestone Report for Preparing Educational Training Consultants: Consulting (PETC-II) (1976).
D. Other Resources: Client systems for consulting practicum--to be arranged by workshop sponsor; cassette recorder and tapes; newsprint, felt pens, masking tape, name tags; resource library (approximately 25 books, as specified in training materials, 1 copy each).
E. Related Products: This program is related to Social Conflict and Negotiative Problem Solving, Research

Utilizing Problem Solving, Interpersonal Communications, Interpersonal Influence, PETC-I and PETC-III.

F. Time Span: This system requires 54 hours of training, 21 hours of individual study and 9 hours of practical experience with the client. Nine days concentrated time is required or three weeks of three three-day sessions.

- CONDITIONS OF USE

Prerequisites: Research Utilizing Problem Solving, Interpersonal Communications, Interpersonal Influence, Preparing Educational Training Consultants I or comparable experiences.
Participants must be present for every session of the workshop since the exercises are sequential and cumulative.

- ADAPTABILITY

Product Availability:
Training Materials: Commercial-Educational Distributing Services (CEDS), P. O. Box 3711, Portland, Oregon 97208.
Evaluation Reports: Northwest Regional Educational Laboratory, Improving Teaching Competencies Program, Dr. John Lohman, Program Director.

- COST RANGE

Instructional strategies, $17.70; Participant Materials, $14.00. Optional evaluation reports are available for $5.00 each.

- REFERENCES: NIE Catalogue, page number 1113.

## PREPARING EDUCATIONAL TRAINING CONSULTANTS: ORGANIZATIONAL DEVELOPMENT (PETC-III)

(Third in the Three-part PETC Series.)

### • INTENDED USERS

This system has been designed for educational personnel with a high degree of consulting skill who wish to acquire organizational development training and consulting skills.

### • MAIN EMPHASES

PETC-III provides participants with the opportunity to acquire the knowledge, skills and sensitivities needed to provide organizational development training and consultation to schools. It provides training in helping an educational organization achieve structural and normative change. Its aim is to prepare consultants to help a client when desired and feasible. These consultants also should be able to help it to change the kinds of objectives it sets for itself and to utilize new kinds of resources in attaining them.

### • INTENTS/CONTENTS

The PETC-III instructional system prepares participants to become Organizational Development (OD) consultants. As a result of this training, consultants are expected to be able to:

.Identify and explain the major organizational development conceptualization and intervention strategies that are presented in the PETC-III instructional system.

.Establish a definite and workable relationship and contract with a client group.

.Meet with a potential client group and translate this group's difficulties into a specific problem or problems on which the group wishes to work.

.Collect information from the client group so the group's problem(s) may be diagnosed and clarified.

.Design, provide and assess the effectiveness of intervention activities that allow the client group to explore and examine alternative norms, processes and structures

.Design, provide and assess the effectiveness of intervention activities that allow the client group to accomplish normative, procedural or structural changes resulting in increased functional capability in the organization.

.Achieve a terminal relationship with the client group by gradual withdrawal and by establishing structures and procedures to substitute for the services provided by the consultant.

### • MAIN ACTIVITIES

During training, the PETC-III trainees complete a preworkshop assignment, attend workshop meetings, and conduct an organizational development project with a predetermined client group.
PETC-III training is spread over a period of eight months. During this time, the PETC-III trainees complete a two-day preworkshop assignment, attend 17 days of workshop meetings, and spend a minimum of ten days conducting an organizational development project with a predetermined client group. The following outlines the timeline for major training events:

.Month 1: Preworkshop assignment (total one day).
.Month 2: Four-day workshop meeting
.Month 3: Three-day workshop meeting
.Month 4: None
.Month 5: Three-day workshop meeting
.Month 6: Three-day workshop meeting
.Month 7: None
.Month 8: Four-day workshop meeting

Note: There are approximately 30 to 35 days between workshop meetings for OE project work with client groups.

### • PROVISIONS FOR USE

A. Format: Workshop

B. Personnel:
Required: Two qualified trainers per 12-27 participants (in terms of 2 or 3).

C. Product Components:
Required: 1 set of 5 monographs per trainer; 1 set of participant materials per participant; 1 copy of the central ideas book per participant.
Optional: Pilot Milestone Report for Preparing Educational Training Consultants: Organizational Development (PETC-III) (1976).

D. Other Resources: None.

E. Related Products: This program is related to Social Conflict and Negotiative Problem Solving, Research Utilizing Problem Solving, Interpersonal

Communications, Interpersonal Influence, PETC-I and PETC-II.

F. Time Span: Training is spread over a period of eight months. Included are: a two-day preworkshop assignment, 17 days of workshop meetings, and at least 10 days spent conducting an OD project.

- CONDITIONS OF USE

Prerequisites: The following training or comparable experiences are required for participation: Research Utilizing Problem Solving, Interpersonal Communications, Interpersonal Influence, Preparing Educational Training Consultants I, Preparing Educational Training Consultants II, Social Conflict and Negotiative Problem Solving.

Participants must be present for every session of the workshop since the exercises are sequential and cumulative.

- ADAPTABILITY

Product Availability: These training materials are slated for publication in fall of 1976.
Optional evaluation reports may be secured from: Northwest Regional Educational Laboratory, Improving Teaching Competencies Program, Dr. John Lohman, Program Director.

- COST RANGE

Not yet available.

- REFERENCES: NIE Catalogue, page number 1116.

# INVENTORY FOR CURRICULUM AND INSTRUCTIONAL IMPROVEMENT

## • INTENDED USERS

A. School district administrators and teachers, working as a team.
B. Persons from intermediate educational service agencies.

## • MAIN EMPHASES

A. Identification of strengths and weaknesses in how the school district presently goes about curriculum improvement. Staff attention is focused on district's present activities for deciding on which areas of curriculum to improve and how improvements are selected, implemented, and evaluated. Package provides procedural guides and forms to record observations and perceptions and to facilitate discussions. Package has been used by school districts with and without outside assistance.
B. Staff development.

## • INTENTS/CONTENTS

Main outcomes:
.Staff become familiar with the ways the district currently undertakes improvement.
.Staff identify strengths and weaknesses in the current approaches.
.Team provides suggestions and, in some instances, develops plans to strengthen the district's improvement processes.
Main content areas:
Substantive: Capability for curriculum improvement; organizational improvement.
Procedural: Organizational assessment; staff involvement, staff development.

## • MAIN ACTIVITIES

Major:
.Team participants record their individual observations and perceptions about current curricular and instructional improvement processes in the school district.
.Participants meet as a group to discuss differences in their perceptions and what those differences suggest in the way of strengthening the curriculum improvement process.

## • PROVISIONS FOR USE

A. Format: Selected participants work through Book I independently; later work through Book II as a group.
B. Personnel: A project coordinator and four to seven other participants are recommended. A clerical person to summarize information is required. No special expertise is required.
C. Product Components:
Required:
.Coordinator's Manual (one),
.Manual for Summarizing Individual Observations and Perceptions (one),
.Book I: Individual Observations and Perceptions (one for each participant),
.Book II: Group Discussion (one for each participant).
D. Other Resources: Duplication of perhaps 10 copies of 15-page Discussion Booklet; group meeting room.
E. Related Products: Since this package helps staff to identify ways to strengthen their district's curriculum improvement capability, a number of management tools included in this catalog could be effectively used in conjunction with this product. For example, the Consultation package from Northwest Laboratory could be used to prepare intermediate educational agency staff to work as external consultants to a school district. The "Inventory" could be used as a consulting tool.
F. Time Span: From 6 to 10 hours for each participant.

## • CONDITIONS OF USE

Package may be used by the team members as individuals for Book I and as a group for Book II. This work is usually spaced over, perhaps, a one week period of time. It has also been adapted to a workshop mode by an intermediate educational service agency that wanted to identify kinds of technical assistance services that could be provided to the school district.
A team approach is strongly recommended. A typical team may include a project coordinator (often a central office administrator), a curriculum supervisor, two or three principals, two or three teachers. Group composition can be

varied according to staff interests and availability. It is important that adequate time be afforded participants.

- COST RANGE

Materials for a group of eight participants (including the project coordinator) cost $9.00. Available from Research for Better Schools, Inc., Suite 1700, 17th and Market Streets, Philadelphia, Pennsylvania 19103. Additional cost factors are release time for the participants, about one clerical person-day, a small amount of duplicating materials.

## HANDBOOK OF COMPREHENSIVE PLANNING IN SCHOOLS

- INTENDED USERS

A. School district administrators, curriculum coordinators and teachers, working as a team.

- MAIN EMPHASES

A. Identification of strengths and weaknesses in curricula. Staff develop or adapt district goals, assign priorities to district goals, prepare and use classroom indicators of performance, and based on data from indicators, prepare recommendations for curriculum improvement.

B. Staff Development: Materials provide procedural guides, work aids, and examples adapted from actual school district practices.

- INTENTS/CONTENTS

1. Main outcomes:
   .Teachers and administrators develop a sense of commitment to an organization.
   .Team develops goal and priority statements.
   .Teachers and administrators identify strengths and weaknesses in curriculum.
   .Teachers and administrators recommend ways to improve classroom performance.
2. Substantive: Curriculum improvement, instructional improvement, organizational improvement.
   Procedural: Comprehensive planning, staff involvement, staff development, needs assessment, goal setting, priority setting, performance measurement.

- MAIN ACTIVITIES

.Team develops or adapts goal statements.
.Team assigns priorities to goals.
.Team prepares classroom performance measures.
.Team builds a plan for inviting other classroom teachers to participate.
.Participating teachers use performance indicators.
.Team collects and analyzes data.
.Participating teachers and principals prepare recommendations for improvement in each school.

- PROVISIONS FOR USE

A. Format: Team participates work as a group in on-the-job situations.

B. Personnel: Project manager and eight to fifteen principals and teachers for each curriculum area. No special expertise is required.

C. Product Components:
Required: Handbook of Comprehensive Planning in Schools. Handbook contains three sections: Basic Skills and Concepts, Beginning Implementation, and Project Manager's Guide.
Available and Recommended: A computer processing system that can be flexibly adapted to the information needs arising from this approach.

D. Other Resources: While no single resource recommended in the Handbook is required, the need for additional knowledge-base resources is clearly expressed by teachers, principals and curriculum coordinators. One resource that has demonstrated value is the set of Hierarchical Objective Charts provided by the Center for the Study of Evaluation, UCLA, in 1973.

E. Related Products: Since this package helps staff to suggest curriculum improvements, several management tools included in this catalogue could be effectively used in conjunction with this product. For example,
   Designing Instructional Programs (FWL)
   Instructional Product Selection Kit (SWERL)
   Curriculum and Instruction: Planning Improvement (RBS)

F. Time Span:
   .About 8 hours for an individual to read materials.
   .About two school years for a team to carry out a planning project.

- CONDITIONS OF USE

Materials have both individual and group exercises and on-the-job applications. A team approach is required. A typical team may include a project manager (often a curriculum coordinator), three or four principals, and seven or eight teachers from different schools and various grade levels from K-12. Group composition can be varied according to focus on the curriculum improvement activity and staff interests and availability.

Strong commitment to participatory decision making by central office staff is essential. A considerable amount of release time for participating teachers is necessary. Since each school district tends to fashion a different approach for each curriculum area, the time required is difficult to pre-specify. Some summer work for participants is usually required as well.

- ADAPTABILITY

Has been used in a three-day workshop mode. Workshop topics could include planning objectives, priorities, program structures, and performance indicators. Workshop mode requires leadership of seasoned consultant.

- COST RANGE

One copy of Handbook for each participant is suggested. Each copy costs $9.95 and is available from Educational Technology Publications, Englewood Cliffs, New Jersey 07632.
As suggested above, release time is an expense.
Reproduction and printing of materials developed by the team is an expense.
Data processing is an expense. The recommended computer system is operated by the Provident National Bank in Philadelphia. Information about this capability is available from the Field Services Division of RBS.

- REFERENCES: NIE Catalogue, page number 1004.

RBS 3

# SURVEYING YOUR COMMUNITY: AN APPROACH TO COMMUNITY INVOLVEMENT IN SCHOOLS

## ● INTENDED USERS

A. School district administrators and teachers, working as a team.
B. Community representatives, working as part of school district team.

## ● MAIN EMPHASES

A. Planning and carrying out of a community survey at either school district or school building levels. Staff attention is focused on issues to be resolved, methods to be used, data processing, analysis and interpretation. Materials include procedural guides, work aids, and examples adapted from actual school district practices. Materials have been used by school districts with and without outside assistance.

## ● INTENTS/CONTENTS

1. Main outcomes:
   .Administrators and teachers plan and carry out a community survey
   .Survey results aid in making decisions or preparing plans
   .Areas for continued community involvement are identified
2. Main content areas:
   Substantive: Community involvement
   Procedural: Design of questionnaire, personal interview forms, and group meeting formats; sample survey methods.

## ● MAIN ACTIVITIES

.Team defines survey purposes.
.Team develops questions to achieve survey purposes.
.Team decides on data collection and sampling methods.
.Team carries out survey.
.Team processes the data.
.Team interprets and reports data.

## ● PROVISIONS FOR USE

A. Format: Participants work as a team in on-the-job situations.
B. Personnel: A project manager and four to seven participants. Some consultant expertise may be needed for sampling and questionnaire design activities.
C. Product Components: Required: Surveying Your Community: An Approach to Community Involvement in Schools. Package contains eight sections: Defining the Purpose of a Community Survey, Developing Questions, Deciding on Sampling and Data Collection Methods, Developing Data Collection Materials, Conducting a Community Survey, Processing the Data, Interpreting the Data and Preparing a Report. A project manager's guide is also included.
D. Other Resources: None
E. Related Products: Several evaluation packages suggest that community data are important. For instance, Evaluation for Program Improvement (FWL), Evaluation Workshop II: Needs Assessment (CSE), Evaluating a Curriculum Program: An Educator's Handbook (RBS).
F. Time Span:
   .About 10 hours for an individual to read materials.
   .From three to six months for a team to carry out a community survey.

## ● CONDITIONS OF USE

Materials are intended for on-the-job applications. A team approach is required. A typical team may include a project manager (often a central office administrator or a principal), someone with instrument design experience, two or three principals, and two or three teachers. A few community representatives could be team members, as well. Release time is necessary to complete staff work.

## ● ADAPTABILITY

Could be used in a three to five day workshop mode. Workshop would require leadership of seasoned consultant.

## ● COST RANGE

One copy of package for each participant is suggested. Each copy costs $8.00 and is available from Research for Better Schools, Inc., Suite 1700, 17th & Market Sts., Philadelphia, PA 19103. As suggested above, release time is necessary. Data processing support is necessary. Consultant assistance may be needed.

● REFERENCES: NIE Catalogue, page number 1017.

5/76

# PUPIL-PERCEIVED NEEDS ASSESSMENT PACKAGE

- INTENDED USERS

School district administrators and teachers, working as a team.

- MAIN EMPHASES

Planning and carrying out a survey of student perceptions at either school district or school building levels. Staff attention is focused on issues to be resolved, methods to be used, data processing, analysis, and interpretation. Materials include procedural guides, work aids, and examples adapted from school district practices. Package has been used by school districts with and without outside assistance.

- INTENTS/CONTENTS

Main outcomes:
.Administrators and teachers plan and carry out a survey of student perceptions.
.Survey results aid in making those decisions at issue.
.Areas for continued student involvement are identified.
Main content areas:
Substantive: Student involvement.
Procedural: Design of questionnaire, student needs assessment.

- MAIN ACTIVITIES

.Team defines survey purposes.
.Team identifies questions to match survey purposes.
.Team decides on data collection and sampling methods.
.Team carries out survey.
.Team processes and analyzes data.
.Team interprets and reports data.

- PROVISIONS FOR USE

A. Format: Team participants work as a group in on-the-job situations.
B. Personnel: A project manager and four to seven participants. Some consultant expertise may be needed for sampling and questionnaire design activities.
C. Product Components:
Required: Pupil-Perceived Needs Assessment Package. Package contains six sections: Planning a PPNA Project (for the Project Manager), Developing an Indicator, Administering the Indicator, Processing Indicator Data, Analyzing and Reporting Results, and a Sampling Supplement. An introductory audio-cassette is included.
D. Other Resources: None
E. Related Products: Curriculum and Instruction: Planning Improvement (RBS). Several evaluation packages that suggest student needs data are important. For instance: Evaluation for Program Improvement (FWL), Evaluation Workshop II: Needs Assessment (CSE), Evaluating a Curriculum Program: An Educator's Handbook (CSE).
F. Time Span: About 6 hours for an individual to read materials. From two to three months for a team to carry out a pupil survey.

- CONDITIONS OF USE

Package is intended for on-the-job applications. A team approach is required. A typical team may include a project manager (often a central office administrator, or a curriculum coordinator, or a principal), someone with instrument design experience, a principal, and two or three teachers. A few students could be team members, as well. Release time is necessary to complete staff work.

- ADAPTABILITY

Has been used in a three-day workshop mode. Workshop requires leadership of someone familiar with the approach.

- COST RANGE

One copy of package for each participant is suggested. Each package costs $25.00 and is available from Research for Better Schools, Inc., Suite 1700, 17th and Market Streets, Philadelphia, Pennsylvania 19103. As suggested above, release time is necessary. Data processing support is necessary. Consultant assistance may be needed.

- REFERENCES: NIE Catalogue page number 999.

CURRICULUM AND INSTRUCTION: PLANNING IMPROVEMENT

- INTENDED USERS

School district administrators and teachers, working as a team.

- MAIN EMPHASES

A. Identifying means of curriculum improvement which are feasible and suitable for the school/district. Staff attention is focused on defining student needs, determining improvement requirements, searching for means of improvement.

B. Staff development.

The package includes procedural guides, work aids, and examples adapted from actual school district practices. Package has been used by school districts with and without outside assistance.

- INTENTS/CONTENTS

Main outcomes:

.Team carries out complete process of identifying means of curriculum improvement.

.Means of improvement identified are compatible with the school or district's requirements.

Main content areas:

Substantive: Curriculum improvement.

Procedural: Clarification of student needs, curriculum planning and analysis, search strategies.

- MAIN ACTIVITIES

.Team clarifies student needs.

.Team establishes requirements for curriculum improvement.

.Team plans and conducts search for alternative means of improvement.

- PROVISIONS FOR USE

A. Format: Team participants work as a group in on-the-job situations.

B. Personnel: A group coordinator and three to six participants. No special expertise is required.

C. Product Components:

Required:

.Curriculum and Instruction: Planning Improvement. Contains three sections: Defining Student Needs, Establishing Improvement Requirements, Planning and Conducting the Search. A separately bound Planning Coordinator's Manual is also included.

.Curriculum and Instruction: A Guide to Alternatives. Contains three separately bound annotated listings of various sources of information which can be consulted in a search for student learning materials, staff development programs, and/or methods of resource allocation. Some specific staff development programs and methods of resource allocation are also described. Master index is provided.

D. Other Resources: None

E. Related Products: This product is a natural follow-on to the Handbook of Comprehensive Planning in Schools. Selecting a Curriculum Program: Balancing Requirements and Costs (RBS) is uniquely suited as a follow-on to this product.

F. Time Span: About 25 hours for an individual to read materials. From two to three months for a team to carry out a planning project.

- CONDITIONS OF USE

Package is intended for on-the-job applications. A team approach is strongly recommended but not required. A typical team may include a group coordinator (often a curriculum coordinator), one or two district/school administrators, one or two teachers, and perhaps a librarian. Release time is necessary to complete staff work.

- ADAPTABILITY

Has been used in a five-day workshop mode; however, additional time is required to conduct the search. Workshop requires leadership of someone familiar with the approach.

- COST RANGE

One copy of Curriculum and Instruction: Planning Improvement for each participant is suggested. Each set costs $10.00. One copy of Curriculum and Instruction: A Guide for Alternatives for each group.

Each set costs $12.00. Both are available from Research for Better Schools, Inc., Suite 1700, 17th and Market Streets, Philadelphia, Pennsylvania 19103. As suggested above, release time is necessary.

## SELECTING A CURRICULUM PROGRAM: BALANCING REQUIREMENTS AND COSTS

### • INTENDED USERS

A. School district administrators and teachers, working as a team.
B. School district administrator, working as an individual.

### • MAIN EMPHASES

A. Selecting a feasible curriculum alternative. Staff attention is focused on developing criteria and using them to select the "best" of several curriculum options.
B. Staff development.

Materials include procedural guides, work aids, and examples adapted from actual school district practices. Materials have been used by school districts with and without outside assistance.

### • INTENTS/CONTENTS

Main outcomes:
.Team carries out complete selection process.
.Selected alternative is compatible with the school district's requirements and budget.
Main content areas:
Substantive: Curriculum improvement.
Procedural: Curriculum selection, cost-analysis, cost-effectiveness.

### • MAIN ACTIVITIES

.If curriculum alternatives are not already provided to team, identification and search activities are initiated paralleling in procedure but not intensity the activities suggested in Curriculum and Instruction: Planning Improvement (RBS).
.Team sets selection criteria.
.Team gathers cost and requirements information.
.Team compares alternatives and selects a program.

### • PROVISIONS FOR USE

A. Format: Team participants work as a group in on-the-job situations.
B. Personnel: A project manager and three to five participants.
C. Product Components:
Required: Selecting a Curriculum Program: Balancing Requirements and Costs. Contains four sections: Identifying Screening Criteria and Suitable Programs, Establishing Selection Criteria, Analyzing Alternative Programs, Comparing Alternatives, and Selecting a Program. A project manager's appendix is also included.
D. Other Resources: None
E. Related Products: This product is a natural follow-on to Curriculum and Instruction: Planning Improvement (RBS).
F. Time Span: About 6 hours for an individual to read materials. From two to three months for a team to carry out a selection process.

### • CONDITIONS OF USE

Materials are intended for on-the-job applications. A team approach is strongly recommended but not required. A typical team may include a project manager (often a central office administrator or curriculum coordinator), one or two principals, and one or two teachers. Release time is necessary to complete staff work.

### • ADAPTABILITY

Can be used in a three-day workshop mode. Workshop would require leadership of someone familiar with the approach.

### • COST RANGE

One copy of the package for each participant is suggested. Each package costs $6.00 and is available from Research for Better Schools, Inc., Suite 1700, 17th and Market Streets, Philadelphia, Pennsylvania 19103. As suggested above, release time is necessary.

### • REFERENCES: NIE Catalogue page number 1217.

## PROPOSAL DEVELOPMENT

- INTENDED USERS

Central office administrators and principals.

- MAIN EMPHASES

Acquire basic skills of managing the development of proposals. A skill training package that includes performance objectives, pre- and post-tests, exercises, examples, and job aids. Package has been used by school district administrators with and without outside assistance.

- INTENTS/CONTENTS

Main outcomes:
.Individual administrator or group of administrators acquire skill to plan and monitor the development of a proposal.
.Proposal usually demonstrates to funding agency that school district has the management capability to produce what is proposed.
Main content areas:
Substantive: Curriculum improvement.
Procedural: Project planning, project budgeting, proposal development.

- MAIN ACTIVITIES

An administrator working independently or administrators working as a group read and interact with materials. The objective may be to learn the skills of managing the development of a proposal or to actually manage the development of a proposal.

- PROVISIONS FOR USE

A. Format: Either the individual working in an on-the-job situation or a workshop.
B. Personnel: In the individual mode, no additional personnel are needed; in the workshop mode, a group leader is needed. Some experience in developing proposals is suggested for the group leader.
C. Product Components:
Required: Proposal Development. Package contains nine lessons and a manual: Proposal Development and Its Relationship to School District Planning and Project Management, Proposal Planning, Proposal Preparation, Project Goal Definition, Project Approach, Project Support Activities, Developing the Detail Proposal, Preparing the Final Proposal Document, Proposal Termination.
D. Other Resources: None
E. Related Products: Project Management: Basic Principles (RBS) provides skill training for project managers and is useful as a lead-in to a proposal development activity.
F. Time Span: About two to three days for an individual to acquire skills of managing a proposal development activity. From two to four weeks for an individual to manage the development of a proposal.

- CONDITIONS OF USE

Package is intended for use by individual administrators working independently in settings of their choosing or in a workshop mode. The workshop requires a group leader.

- COST RANGE

One copy of the package for each participant is required. Each package costs $25.00 and is available from Research for Better Schools, Inc., Suite 1700, 17th and Market Streets, Philadelphia, Pennsylvania 19103.

- REFERENCES: NIE Catalogue page number 1122.

## PROJECT MANAGEMENT: EXECUTIVE ORIENTATION

### INTENDED USERS

A. Top level school district administrators.
B. Top level state educational agency or intermediate educational service agency administrators.

### MAIN EMPHASES

Orientation to acquaint top level administrators with the kinds of support required by projects and project managers. A training package that includes examples adapted from actual school district practices. Materials have been used by school districts with and without outside assistance.

### INTENTS/CONTENTS

Main outcome:
Individual administrator or group of administrators gains an overview of project management concepts, and the ways people manage projects.
Main content areas:
Substantive: Project management.
Procedural: Project management.

### MAIN ACTIVITIES

Administrator(s) working independently or in a group reads and/or views materials and completes exercises and tests. If a group mode is employed, opportunities for group discussions are provided.

### PROVISIONS FOR USE

A. Format: Administrator working independently or administrators working in a group.
B. Personnel: A leader is needed for the group mode.
C. Product Components:
Required: Project Management: Executive Orientation. Notebook contains a user manual and four lessons: Building Conviction, Organizational Structuring, The Life Cycle of a Project, Securing More Information.
Optional: Four filmstrips and four cassette tapes (content almost identical to the notebook).
D. Other Resources: Project Management: Basic Principles (RBS) is uniquely suited as a follow-on for training administrators who manage or will manage projects.
E. Related Products: None
F. Time Span: One day.

### CONDITIONS OF USE

Package is intended for either the administrator working alone or in a group. Administrators can use the audio-visual optional package (a) in place of the notebook, (b) to supplement the notebook, (c) or for review purposes.

### ADAPTABILITY

Has been used in graduate level educational administration classes.

### COST RANGE

One copy of the notebook for each participant is suggested. The notebook costs $5.00. One copy of the optional filmstrip/cassette material for each school district is recommended. These materials cost $20.00. Notebook and optional materials are available from Research for Better Schools, Inc., Suite 1700, 17th and Market Streets, Philadelphia, Pennsylvania 19103.

### REFERENCES: NIE Catalogue page number 1119.

# PROJECT MANAGEMENT: BASIC PRINCIPLES

## • INTENDED USERS

Project managers (may be central office administrators, curriculum coordinators, principals, or teachers with important project responsibilities).

## • MAIN EMPHASES

.A skill training package for those who manage or will manage projects. Training is focused on developing skills in project definition, work flow, time estimation, resource estimation and scheduling, cost estimates and budgeting, project start-up, project information systems, project monitoring and control, project termination. Materials have been used by school districts with and without outside assistance.

.Staff development.

A skill training package that includes pre-post tests, procedural guides, examples adapted from actual school district practices, and an extensive case simulation activity.

## • INTENTS/CONTENTS

Main outcomes: Administrators learn and practice skills in managing projects.
Main content areas:
Substantive: Project management.
Procedural: Planning projects, implementing project.

## • MAIN ACTIVITIES

Individual administrator or group of administrators reads and/or views materials and completes exercises and tests. If a group mode is employed, opportunities for discussions are provided.

## • PROVISIONS FOR USE

A. Format: Administrator working independently or administrators working in a group.

B. Personnel: A leader experienced in managing projects is needed for the group mode.

C. Product Components:
Required: Project Management: Basic Principles, Volume I, Lessons 1-6. Project Management: Basic Principles, Volume II, Lessons 7-12; Project Management: Basic Principles, Volume III, Case Simulation.
Optional: Twelve filmstrips and 12 cassette tapes (content almost identical to the notebook).

D. Other Resources: Project Management: Executive Orientation (RBS) is uniquely suited as a way to acquaint top level administrators with the activities and needs of project managers.

E. Related Products: Proposal Development (RBS) suggests how to manage the preparation of a proposal by using project management skills.

F. Time Span: About five days.

## • CONDITIONS OF USE

Package is intended for either the administrator working alone or in a group. Administrators can use the audio-visual optional package (a) in place of the Volume I and II notebooks, (b) to supplement the notebooks, (c) or for review purposes.

## • ADAPTABILITY

Has been used in workshops sponsored by state educational agencies and intermediate educational service agencies for their staff and for school district staff. Has been used in graduate level educational administration classes.

## • COST RANGE

One copy of the notebooks for each participant is suggested. The three notebooks cost $20.00. One copy of the optional filmstrip/cassette materials for each school district is recommended. These materials cost $60.00. Notebooks and optional materials are available from Research for Better Schools, Inc., Suite 1700, 17th and Market Streets, Philadelphia, Pennsylvania 19103.

## • REFERENCES: NIE Catalogue page number 1107.

## HUMAN DIMENSIONS OF SCHOOL IMPROVEMENT

### ● INTENDED USERS

.Central office administrators, principals, teachers.
.State educational agency and intermediate service agency administrators. Students of educatonal administration and curriculum.

### ● MAIN EMPHASES

.Highlights important factors to be considered when implementing educational change. Focus on various models that describe ways people interact is provided.
.A book that includes exercises and examples adapted from actual school district practices. Package has been used by school district staff with and without outside assistance.

### ● INTENTS/CONTENTS

Main outcomes: Users learn about different techniques for managing human resources.
Main content areas:
Substantive: Organization, organizational change, leadership.
Procedural: Managing.

### ● MAIN ACTIVITIES

An individual participant reads materials and completes exercises.

### ● PROVISIONS FOR USE

A. Format: A text which individuals can work through independently.
B. Personnel: None.
C. Product Components:
Required: Human Dimensions of School Improvement. Book contains 15 chapters.
D. Other Resources: None.
E. Related Products: Social Conflict and Negotiating Problem Solving (NWREL), Organizational Development (NWREL), Theory and Research on Organizational Development and Change (CEPM), Technology for Organizational Change Specialists (CEPM), Descriptions and Human Support for Organizational Change Specialists (CEPM).
F. Time Span: Two or three days.

### ● CONDITIONS OF USE

No special conditions.

### ● ADAPTABILITY

A workshop based on concepts and theories described in this book has been sponsored by a state education agency. Book has been requested by several professors for use in university classrooms.

### ● COST RANGE

One copy of the book costs $7.00 and is available from Research for Better Schools, Inc., Suite 1700, 17th and Market Streets, Philadelphia, Pennsylvania 19103.

EVALUATING A CURRICULUM PROGRAM: AN EDUCATOR'S HANDBOOK

- INTENDED USERS

School district administrators and teachers working as a team.

- MAIN EMPHASES

Planning and carrying out of an evaluation of a curriculum program. Staff attention is focused on planning the evaluation, developing and applying evaluation methods, and reporting results.
Materials provide procedural guides, work aids and examples adapted from actual school district practices. Materials have been used by school districts with an without outside assistance.

- INTENTS/CONTENTS

Main outcomes:
.Team plans and carries out evaluation.
.Team recommends modification, spread, or termination of the curriculum program.
Main content areas:
Substantive: Curriculum evaluation.
Procedural: Planning an evaluation, developing evaluation instruments, assessing implementation, assessing outcomes.

- MAIN ACTIVITIES

.Team describes program to be evaluated.
.Team develops evaluation questions.
.Team prepares data collection and analysis specifications.
.Team prepares evaluation plan.
.Team carries out evaluation.
.Team reports findings and makes recommendations.

- PROVISIONS FOR USE

A. Format: Team participants work as a group in on-the-job situations.
B. Personnel: A project manager and three to six participants. Some consultant expertise may be needed.
C. Product Components:
Required: Book I: Planning an Evaluation Effort. Book contains four sections: Describing the Program, Developing Evaluation Questions, Preparing Initial Specifications for Data Collection and Analysis, Summarizing and Reviewing the Planning Effort.
Book II: Guidelines for Conducting an Evaluation. Book contains four sections: Planning Data Collection and Analysis, Collecting the Data, Processing the Data, Interpreting the Data and Reporting the Results.
D. Other Resources: None.
E. Related Products: CSE Elementary School Test Evaluations, CSE Secondary School Test Evaluations, CSE Preschool/Kindergarten Test Evaluations, CSE-RBS Test Evaluations.
F. Time Span: About ten hours for an individual to read materials. About one school year for a team to carry out an evaluation project.

- CONDITIONS OF USE

Materials are intended for on-the-job applications. A team approach is recommended. A typical team may include a project manager (often a central office administrator, evaluator, curriculum coordinator, or principal), someone with evaluation experience, principals and teachers. Release time is necessary to complete staff work.

- ADAPTABILITY

Has been used by individuals working independently. Could be used in a five day workshop mode. Workshop would require leadership of a seasoned evaluator.

- COST RANGE

One copy of package for each participant is suggested. Each copy costs $9.00 and is available from Research for Better Schools, Inc., Suite 1700, 17th and Market Streets, Philadelphia, Pennsylvania 19103. As suggested above release time is necessary. Data processing support is necessary. Consultant assistance may be needed.

- REFERENCES: NIE Catalogue page number 1015.

# AN ORGANIZATIONAL PERSPECTIVE ON PLANNING AND PROBLEM SOLVING IN SCHOOLS

A presentor's guide sponsored by Association of California School Administrator's (ACSA) Project Leadership.

### INTENED USERS

Intended for use primarily by school or district level administrators. May also be used with teachers, parents, or "mixed" groups.

### MAIN EMPHASES

1. Provides a synthesis of organizational concepts into a perspective that administrators find particularly useful in thinking about the problems involved in changing schools. The major impact of this workshop is that it provides a different perspective--organizational, as contrasted with individualistic (or personality)--from which to operate. The kit is a combination of "doing" and "listening"--beginning skills in applying the concepts are reinforced through simulations.
2. Needs assessment, problem solving, planning, structural change.

### INTENTS/CONTENTS

1. The main goals of this Presentor's Guide are to (a) present organizational theory as a useful administrative tool, (b) give administrators some simulated experiences in applying an organizational perspective to problem-solving and planning, and (c) help administrators begin to develop new administrative roles and behavior.
2. Substantive: Perspective building, the Five Subsystems of Organizations, The "Hernia" Theory of Organizational Change; The Administrator As an Organizational Leader.
   Procedural: Instructor's self-inventory; Expectations surfacing; Final evaluation.

### MAIN ACTIVITIES

Listening to presentation and participating in simulations and applications of concepts equally dominate the activity structure. The participants can work on either fictitious problems (provided in the kit) or their own real problems.

### PROVISIONS FOR USE

A. Format: Workshop Kit.
B. Personnel: Workshop leader required. Two co-leaders recommended.
C. Product Components: Monograph, Instructor's Manual, 40 transparencies, 5 handout masters. All are included in kit.
D. Other Resources:
Required: Overhead projector, colored pens that write on transparencies, butcher paper and markers.
E. Related Products: None
F. Time Span: 3 hours minimum, 5 hours optimum.

### CONDITIONS OF USE

Best used with a group where the participants are contemplating change or have particular problems. No major prerequisites or required level of commitment.

### ADAPTABILITY

Can be used as an introduction to almost any kind of conference/seminar/workshop, since the organizational perspective can be applied to any kind of proposed change (e.g., curricular, structural, media, community, etc.)

### COST RANGE

The Presentor's Guide can be purchased from the Association of California School Administrators, Attention Dr. Larry Ruttan, Director, Project Leadership, Saddle Square, 12440 Firestone Boulevard, Suite 209, Norwalk, California 90650, (213) 868-0846, at the following costs:

| Type of Organization | Purchase | Rental |
|---|---|---|
| ACSA Regions and Charters | $25 | $10 |
| California School Districts | 35 | 15 |
| Other Educational Agencies | 45 | 25 |

- REFERENCES: NIE Catalogue page number 1160.

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## INSTRUCTIONAL PRODUCT SELECTION KIT (IPSK)

- INTENDED USERS

Anyone concerned with the selection of instructional products for use in the schools--including: textbook adoption committees, administrative and supervisory personnel, teachers, professional organizations, educational advisory committees, school board members, graduate and undergraduate classes.

- MAIN EMPHASES

IPSK provides resources for conducting a professional workshop that focuses on a selected set of criteria for evaluating and selecting instructional products. The Kit also provides opportunities for identifying and discussing other criteria important to instructional product selection.

- INTENTS/CONTENTS

IPSK prepares users to perform the following tasks:
.To identify in instructional programs and materials the presence or absence of criteria presented on the Product Selection Checklist;
.to compare competing instructional products according to these selection criteria, and;
.to use the selection criteria for product selection decisions in a variety of contexts.
IPSK emphasizes the following selection considerations:
.Outcomes or instructional objectives of the product;
.assessment materials and procedures used for determining outcome attainment;
.reports of previous product use in a variety of school situations;
.instructional and supplementary materials and procedures used to provide instruction and practice on the program outcomes;
.installation requirements of the product, including the training of staff and monitoring the ongoing progress of pupils using the product, and;
.time and cost considerations.

- MAIN ACTIVITIES

Main activities occurring throughout the workshop are:
.Participants examine three brochures that describe fictitious elementary school science programs. These brochures were patterned after publisher promotional materials currently on the educational market.
.The three simulated programs are ranked in the order participants would select and purchase these programs for their own school situations. Participants include brief rationale statements to accompany their rankings.
.A filmstrip "Guidelines for Selecting Instructional Products" is shown to identify and describe criteria for the selection of instructional products.
.The booklet "Considerations in Selecting Instructional Products" is distributed. The booklet discusses the rational supporting the selection consideration and contains a checklist which summarizes the criteria in question form.
.Participants then work through a set of Exercise Items to give them practice in applying the specific selection criteria.
.The three simulated science program brochures are re-examined by participants, to determine whether they meet each of the selection criteria presented in the workshop.
.A discussion of the rating is conducted and the overall results are used as a basis on which participants re-evaluate their initial program selection.
.Extension activities may also be used for a more extensive examination and discussion of the product selection criteria.

- PROVISIONS FOR USE

A. Format: Workshop or Inservice Sessions. The Kit may also be used in a self-study mode.
B. Personnel: Instructor required for workshop or inservice use.
C. Product Components: The Kit includes all necessary materials for an instructor and 12 participants. Additional materials can be ordered to accommodate additional workshop participants.
D. Other Resources: Facilities and equipment needed to conduct the workshop include a quiet, well ventilated room that can be darkened, space for participants to write and study workshop

materials, and a filmstrip projector, screen, extension cord and cassette tape recorder.

E. Related Products: RBS Selecting a Curriculum Program: IWL Designing Instructional Programs.

F. Time Span: Workshop can be scheduled as a single session or a series of two or three hour sessions. Estimated total is three to six hours, depending on the background of participants.

- CONDITIONS OF USE

No specialized background or training is required to conduct or participate in the workshop. The workshop coordinator, however, should prepare for the workshop by studing the Instructor Guide, and becoming acquainted with all IPSK materials and procedures before conducting the session. IPSK procedures can be modified to meet the needs of each particular audience; the Workshop Coordinator should determine the sophistication level of the audience and plan on modifying workshop activities accordingly.

- ADAPTABILITY

IPSK procedures that are easily adapted to meet the needs of the particular audience. The IPSK is intended to be a versatile support resource that can be modified as needed to act as a mechanism for discussing and establishing instructional product selection criteria and procedures. For example, participants may want to modify the IPSK selection criteria to emphasize certain selection considerations felt to be most important. Also, selection criteria can be added to include considerations unique to a particular environment, such as local, district, and state requirements. The Kit includes extension activities to provide opportunities for more in-depth examination of the selection criteria and criterion-referenced classroom-verified products.

- COST RANGE

IPSK cost $30.00 and includes all materials for an instructor and 12 participants. Extra copies of participant materials can be ordered in sets of 12 and cost $15.00 and $7.50 for the non-consumable and consumable participant materials respectively.

The Kit is available from SWRL Educational Research and Development, Division of Resource Services, 4665 Lampson Avenue, Los Alamitos, California 90720.

- REFERENCES: NIE Catalogue, page number 1154.

# SWRL PROFICIENCY VERIFICATION SYSTEMS (PVS)

## • INTENDED USERS

PVS is used by teachers and administrators in conjunction with elementary mathematics programs in grades 2-6.

## • MAIN EMPHASES

PVS is an assessment/information system designed to provide teachers and administrators with 1) comprehensive information about the skills intended for development in the school's elementary mathematics program, and 2) detailed, well-organized reports of pupils' learning accomplishments as they relate to specific mathematics instructional materials and classroom practices.

## • INTENTS/CONTENTS

PVS reports provide school personnel with information on specific pupil proficiencies resulting from instruction. This PVS information is used to: 1) credit the schools instructional accomplishments, 2) in decision-making related to the planning, implementation, and evaluation of specific instructional programs, and 3) as diagnostic indicators of pupil performance for planning activities directed at maintaining and improving program effectiveness.

The basic component of PVS is the Annual Pupil Survey (APS), administered at the end of the school year. The APS includes a broad range of test items representing instruction in major commercial mathematics programs. The entire range of items for each APS is spread over multiple text forms, with every child taking just one form of the test. The items that are common across all tests focus on benchmark skills such as number recognition, computation, measurement, and verbal problem solving. From the APS, separate reports are generated for district coordinator, principals, and teachers.

## • MAIN ACTIVITIES

The flexibility and simplicity of PVS operations accommodate each district's unique decision-making and organizational structure. PVS operations are easily monitored by one person designated within the district as PVS coordinator and by individual school principals. Participation in PVS includes the following basic activities:

.District personnel identify anticipated scope of PVS participation, and the mathematics programs and other materials being used.

.During the year, PVS participants are sent appropriate resources for initiating PVS using various PVS components with the designated programs.

.Districts return all assessment records to SWRL for data analysis.

.SWRL sends PVS Class, School, and District Reports to appropriate district and school personnel.

Training materials and procedures are provided by SWRL to familiarize key school personnel with PVS operations and applications. An early orientation helps prepare administrative, supervisory, and instructional personnel to derive maximum advantage from PVS participation and use of the mathematics programs.

## • PROVISIONS FOR USE

A. Format: Assessment information system; PVS reports are used by school personnel during the year to make instructional management decisions.

B. Personnel: District and school administrators and teachers.

C. Product Components: Checklist of Mathematics Objectives; Annual Pupil Survey; District, Class and School Reports; Beginning-Skills Inventory (optional); Learning Mastery Systems (optional); Mid-Program Survey and Report (optional).

D. Other Resources: None.

E. Related Products: SWRL Learning Mastery Systems (LMS): Reading and Mathematics, SWRL Quality Assurance (QA) Information Service.

F. Time Span: Approximately one school year to correspond with mathematics program usage.

## • CONDITIONS OF USE

To initialize PVS use, district personnel participate with SWRL in identifying programs and program materials in use in classrooms within the district, and basic ways these materials are used during instruction.

- ADAPTABILITY

Options for PVS use include additional pupil surveys, reports formatted to district specifications, and a system for diagnosing children's learning accomplishments on key skills within regular daily activities. The R&D on which PVS is based may be applied to a variety of instructional programs that feature outcomes-based instruction.

- COST RANGE

Undetermined at this time.

The Kit is available from SWRL Educational Research and Development, Division of Resource Services, 4665 Lampson Avenue, Los Alamitos, California 90720.

## STAGES OF CONCERN ABOUT THE INNOVATION

This concept and measure is one of two key developmental dimensions of the Concerns-Based Adoption Model (CBAM) which has been developed and researched in the Procedures for Adopting Educational Innovations Project at the Research and Development Center for Teacher Education, the University of Texas at Austin.

### • INTENDED USERS

A. Primary: Researchers of the change process and evaluators of the effects of innovations would find the Stage of Concern Checklist a useful tool.

B. Secondary: Change agents, adoption agents, staff development personnel, administrators and other practitioners in school and college settings that are interested in having diagnostic information in relation to planned change and the implementation of specific innovations would have use for this measure as well.

### • MAIN EMPHASES

The concept of Stages of Concern About the Innovation provides a conceptual tool and theory which practicing change agents, researchers, and evaluators can use in studying and analyzing the change process as experienced by individuals. The concept of concerns proposes that there are developmental stages that an innovation user's concerns move through as he adopts and implements an innovation. The Stage of Concern Checklist consists of thirty-five items which are responded to on a Likert scale. The measure, when scored, provides a set of seven concerns stage scores which provide a profile of the concerns of the respondent in relation to a particular innovation. Seven different Stages of Concern have been identified. The Stage of Concern Checklist provides a psychometric procedure for assessing the concerns of innovation users. An open-ended form of the measure that does not require machine scoring is available for use in less rigorous settings. The thirty-five-item checklist can also be clinically scored to provide greater richness and insight into individual respondent's concerns, preoccupations and feelings about the innovation.

### • INTENTS/CONTENTS

The Stages of Concern as a concept can provide a diagnostic basis for designing workshops and other interventions that are personalized by being tailored to the "concerns" of the innovation users. The goal of the Concerns-Based Adoption Model research project is to research further the phenomenon of change as experienced by individuals by assessing their concerns and developing diagnostic procedures and a basis for determining personnally relevant and needed interventions.

### • MAIN ACTIVITIES

A. Major: The concept of concerns provides a useful handle for organizing and describing an innovation user's feelings, motivations, felt needs and attitude toward an innovation.

B. Minor: The Stage of Concern Checklist is a paper-pencil measure, consisting of thirty-five items and a demographic page. It takes on the average ten to fifteen minutes to complete. The scoring at present is done by computer with the use of percentile norms. The resultant information would be used by the manager of the change process as diagnostic information and to provide further insight into the dynamics of the individuals that are involved in the change process.

### • PROVISIONS FOR USE

A. Format: A concept that can be learned by studying the related publications and research reports, and a paper-pencil measure that is responded to and machine scored.

B. Personnel: The measures can be responded to by classroom teachers, administrators, and college faculty. A limited amount of research has also been done in industrial settings, suggesting that the concept applies there as well.

C. Product Components: A series of publications and research reports, and the three- to four-page measure, which consists of a cover page, two pages of items, and a demographic page.

D. Other Resources: Scoring materials are necessary. At the present time, scoring is done by computer and a percentile score for each stage is determined based upon percentile norms stored in the computer. A user's manual for SoC Checklist is being developed.

E. Related Products: The Stage of Concern Checklist is one component of the assessment system being developed as a part of the research being done in relation to the Concerns-Based Adoption Model. Another key component is the concept of Levels of Use of an Innovation. A focused interview procedure is used to determine an individual's Level of Use. A third component in this research project is the "Trouble-Shooting" Checklist, which is a tool that change agents can use when entering an institution to assess its potential for successful innovation implementation.

F. Time Span: None

- CONDITIONS OF USE

The concept of concerns can be acquired by studying the available publications. The Stage of Concern Checklist, at this time, is not available for general distribution since establishing the final scoring procedures is still in process. A user's manual is planned for development.

- ADAPTABILITY

The measure has been designed specifically to be generic in its use. That is, it can be easily adapted to different innovations, both process and product, and has also been used with many different populations, ranging from elementary school teachers to university faculty.

- COST RANGE

Costs are nominal, as the measure consists basically of three pages. Computer processing does not require any unusual costs; however, training in doing clinical analyses would have personnel costs.

- REFERENCES: NIE Catalogue page number 1008.

## LEVELS OF USE OF THE INNOVATION

This concept and measure is one of two key developmental dimensions of the Concerns-Based Adoption Model (CBAM) which has been developed and researched in the Procedures for Adopting Educational Innovations Project at the Research and Development Center for Teacher Education, the University of Texas at Austin.

### • INTENDED USERS

A. Primary: Researchers studying the implementation of innovations in various educational settings.
B. Secondary: Practicing change agents, administrators, managers of change and others interested in describing and assessing an individual's use or nonuse of a particular innovation or innovative approach.

### • MAIN EMPHASES

A. Primary: To provide a procedure for describing and assessing an individual's approach to use of an innovation in a psychometrically rigorous way. The measurement procedure can be used both for diagnostic purposes in designing interventions to facilitate change and as a criterion variable for assessing the degree and extent to which innovations have been implemented.
B. Secondary: The concept of Levels of Use of an Innovation provides a lay language hand-hold for viewing and describing the developmental steps that individuals take as they move toward sophisticated use of an innovation.

### • MAIN ACTIVITIES

The focused interview procedure requires a twenty to thirty minute time period in which the interviewer conducts what appears to be a casual conversation about the interviewee's use of an innovation. The resultant tape-recorded interview can then be rated by trained raters or by the interviewer to determine the interviewee's Level of Use. Based on the interview, assessment can be made of the overall Level of Use. A more in-depth assessment can be made by rating seven different categories that relate to specific dimensions of Levels of Use such as acquiring information, assessing, sharing and performing. It is through these dimensions that even more insight and clinical detail can be gained to provide both diagnostic information and evaluative information in relation to how an individual is approaching use of an innovation.

### • PROVISIONS FOR USE

A. Format: The interviewer conducts about a twenty minute focused interview which consists of an apparent casual conversation with the interviewee. This interview is tape recorded and the results rated to determine Level of Use.
B. Personnel: The measure can be used by all personnel, once trained -- managers of change, change agents, classroom teachers, college professors, graduate assistants, staff development specialist, etc. It is essential that the personnel be trained to a reliable level in both rating and interviewing since the two components are closely related.
C. Product Components: The Levels of Use (LoU) as a concept has been defined through several articles and publications and is operationally defined in the Levels of Use Chart. The interviewer needs to be fully familiar with all of these references and know the LoU Chart, as well as being trained in the interviewing process. A rating procedure has also been developed and the interviewer and any raters need to be trained in this process as well.
D. Other Resources: Portable tape recorders and audiotape playback facilities are essential if the concept of Levels of Use and the interview procedure are going to be used in research and evaluation studies. For clinical diagnosis and non-research uses, tape recording of the interview is probably not necessary.
E. Related Products: The Levels of Use concept and interview procedure is one component of the research that is being conducted by the Procedures for Adopting Educational Innovations Project as it studies the implementation of innovations as described in the Concerns-Based Adoption Model (CBAM). Other

components include another developmental dimension of individual user development, that is, Stages of Concern About the Innovation, and the "Trouble-Shooting" Checklist, which is used to assess a school's or college's potential for successful implementation.

F. Time Span: It is estimated that training to conduct Levels of Use interviews and to rate these interviews reliably would take twenty to thirty hours of training and practice time. Conducting an actual Levels of Use interview takes fifteen to thirty minutes.

- CONDITIONS OF USE

Understanding the concept of Levels of Use can be accomplished by studying several of the available publications and research reports. The Levels of Use interview procedure at the present time is undergoing final refinement and limited pilot testing with researchers, staff development personnel, and managers of change outside of the Texas R&D Center. Once these limited pilot test studies have been completed and we are confident that the procedures can be validly exported, then the resultant training package will be available for other interested researchers and change specialists. At the present time, use of the interview procedure would require establishing a close working relationship with the staff of the Procedures for Adopting Educational Innovations Project to insure that the procedure is used both reliably and validly.

- ADAPTABILITY

The interview procedure has been developed so that it is generic in nature, that is, it can be applied to many innovations in many different settings. Extensive research has been done using the interview procedure with both process and product innovations with individuals in elementary through secondary schools, college and university settings, and to a limited extent, in industrial settings.

- COST RANGE

Cost figures are not available at this time, other than the cost for various printed materials, which range from $2.00 to $4.00 per publication. Training is only available on an extremely limited basis.

- REFERENCES: NIE Catalogue page number 1010.

# "TROUBLING SHOOTING" CHECKLISTS (TSC)

(There are two forms of the checklists: one for school settings and one for higher educational settings). These checklists are part of the Procedures for Adopting Educational Innovations Project (Research and Development Center for Teacher Education Education, The University of Texas at Austin).

## • INTENDED USERS

A. Primary: The main objective of the TSC is to assist both internal and external change agents in predicting the chances of successfully helping an institution adopt an innovation.

B. Secondary: The TSC could be of use to any member of an organization who is interested in adopting innovations. Because the items break down into scales, the instruments may also be completed by several members of one organization in order to identify problem areas on which all members of an organization agree.

## • MAIN EMPHASES

The TSC is designed to provide information to aid educational change agents and administrators at all educational levels in making difficult decisions concerning funding for institutions desiring to adopt innovations. In addition, the TSC may serve as work aides to assist members of an organization in identifying problem areas within the organization. It is hoped that these instruments will provide a means to assess whether or not an institution can be expected to normally progress in its levels of use and stages of concern with respect to the adoption of innovations.

## • INTENTS/CONTENTS

The TSC is predictive in nature and focus on the organization as a whole. Although the TSC identifies behaviors of individuals, and particular organizational characteristics, an overall institutional profile is the true target. This profile is predictive in that it assesses an institution's potential to implement an innovation. The TSC is also diagnostic, in that the profile points out both the stronger and weaker aspects of the institution.

## • MAIN ACTIVITIES

Each TSC contains 100 descriptive statements. The participant rates each statement on a 1 to 5 scale, indicating whether or not each item is descriptive of the institution which is being rated. The participant then scores the instrument according to instructions.

## • PROVISIONS FOR USE

A. Format: The TSCs consist of 100 descriptive statements presented in a Likert-type format. In addition, these 100 items can be broken into scales which focus on particular aspects of an educational organization.

B. Personnel: The TSCs require one respondent. However, the TSC may be completed by several members of one organization in order to identify areas of agreement/disagreement with respect to organizational needs assessment.

C. Product Components: The product consists of a 100-item instrument with scoring and user instructions.

D. Other Resources: None

E. Related Products: Stages of Concern Instrument Manual; Levels of Use Interview Manual.

F. Time Span: 30 minutes.

## • CONDITIONS OF USE

The TSCs are easily used, requiring only that the user be sensitive to the educational institution's characteristics and dynamics which the TSCs address.

## • ADAPTABILITY

The TSCs may be used by change agents, administrators, or teachers concerned with change, or they may be used as a training and research tool for anyone interested in identifying organizational variables which effect the success of innovations in educational settings.

## • COST RANGE

The instruments are available for the cost of $1.50 per instrument manual.

• REFERENCES: NIE Catalogue page number 1013.

## "INDIVIDUALLY GUIDED EDUCATION" (IGE) (Multiunit School Implementation)

- INTENDED USERS

Elementary Schools

- MAIN EMPHASES

Individually Guided Education (IGE) is a comprehensive system of schooling designed to produce higher educational achievements through providing well for differences among students in rate of learning, learning style, and other characteristics. IGE provides an alternative to the traditional age-graded self-contained classroom type of education prevalent in elementary schools. The organizational structure of this new system of education is that of the multiunit organization. The other esential IGE components include: a system of instructional programing for individual student, a system of evaluation for educational decision making, curricula materials compatible with the systems of instructional programing and evaluation, a program of home-school-community relationships, organizational environments which facilitate the implementation of IGE, and continuing research and development to improve and refine IGE concepts and practices.

- INTENTS/CONTENTS

The materials necessary to implement IGE are available both in print and media formats. The texts, guides, filmstrips, and films deal with the functioning concepts as they relate specifically to establishing and refining an IGE school: organizational structure, administration, instruction and teaching, assessment and evaluation, curriculum, decision making, goal setting, facilitative environments, and home-school-community relations.

- MAIN ACTIVITIES

The major activities involved in implementing IGE are incorporated into staff development training and include the following activities: listening to presentations, viewing media, writing goals and objectives, small group planning and decision making, participating in simulations, and receiving onsite consultive assistance.

- PROVISIONS FOR USE

A. Format: Schools implementing IGE may do so through one or more of the following strategies:
   1. Three to five days of staff development training for principals and unit leaders, followed by three to five days of staff development training for the total elementary school staff. These are conducted by an external implementor or facilitator.
   2. Teacher education courses, seminars, and workshops.
   3. A school district's regular staff development program.

B. Personnel: None

C. Product Components: Schools attempting to implement IGE should [illegible] some basic inservice materials. These assist the school staff in developing basic understandings. The following materials are suggested:
   1. Books and other Print Materials.
   Minimum:
   .Individually Guided Elementary Education: Concepts and Practices.
   .The Teacher and Individually Guided Education.
   .The Unit Leader and Individually Guided Education.
   .The Principal and Individually Guided Education.
   .IGE Performance Objectives Brochure.
   .IGE Performance Objectives Resource File.
   Optional:
   .Franklin Elementary School Simulation Series
   .IGE Implementor's Manual.
   2. Audiovisual Materials.
   .IGE audiovisual package available from the Wisconsin R&D Center
   .IGE leadership series films and filmstrips available from Addison Wesley.

D. Other Resources: None

E. Related Products: Many of the products produced by other labs and centers are compatible and helpful in implementing an IGE program.

F. Time Span: The implementation process of IGE is identified by four phases: awareness, commitment, changeover, and refinement. Typically, schools move through awareness, commitment, and changeover activities in a year's period of time. Refinement activities are more ongoing.

- CONDITIONS OF USE

Implementation of IGE is a complex task requiring the school to work closely with an implementation agency. It is absolutely critical that teachers and administrators are committed to the change and participate in the complete staff development preservice program.

- ADAPTABILITY

IGE provides a framework whereby implementing schools can adopt a large variety of curriculum and process products provided they meet certain criteria.

- COST RANGE

The average cost for inservice materials is approximately $250 and the cost of staff development ranges between $500 and $600. These costs can vary depending on the proximity of the school to other IGE resources.

Materials are available through 23 state networks. For specific addresses, contact Dr. Walter Krupa, WRDC, The Wisconsin Research and Development Center for Cognitive Learning, The University of Wisconsin, Madison, Wisconsin 53705.

- REFERENCES: NIE Catalogue page number 1076.